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CareDirector Youth 8.0.1

User Guide

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Chapter 1) Introduction

This session describes the functionality of CareDirector Youth, the process of logging onto the CareDirector Youth application and introduces some basic navigation within CareDirector Youth. It also describes the Work Management screen of CareDirector Youth, which a worker can use to track the status of their on-going tasks. This session also contains an introduction to the Security and Workflow features introduced to CareDirector Youth at Version 2.2.

At the end of this session delegates will be familiar with:

- Starting the CareDirector Youth application from the desktop and Logging In
- An overview of CareDirector Youth Security, Localisation and Workflow
- Screen Layout, Controls and Navigation within CareDirector Youth
- Using the Work Management screen
- Configuring User Preferences
- Using Alert Me to set up various CareDirector Youth alerts
- Background
- CareDirector Youth Security
- Localisation
- Workflow
- Logging onto CareDirector Youth
- A look at Screen layout
- The CareDirector Youth Banner
- Screen Controls
- System Navigation
- Idle Timeout
- Logging Out
- Work Management Module

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- User Preferences
- Alert Me Module
- Summary

CareDirector Youth is an application, developed by CareWorks, which uses a case management approach to record the services that are provided to Social Services clients.

The system includes a client module containing personal details and family household information. Referrals may be logged against these clients and electronically allocated for Assessment and Care Management.

Standard forms are electronically stored and are presented as HTML documents.

Information from the database is automatically inserted into these documents. Data entered into the documents may be processed to update the database. This means that users can interact with the system through their standard forms on screen.

To avoid transcription, previously recorded forms may be cloned and become the basis for current assessments or forms.

The system includes automated electronic mail notifications to inform users of key events during the management of a case. Authorities can configure these email notifications based on workflows configured.

Each time a piece of information is accessed on the system, the system stores a record. Audit Trails show the date and time that an item has been read or updated.

CareDirector Youth Security

Users of CareDirector Youth will not automatically be given access to all available CareDirector Youth modules. When a user logon is created in the system, the logon name will be associated with a security profile for each module to which they require access. This profile will grant the user access to the module and will further control the level of detail visible to the user within that module, as well as the actions that the user may carry out in that module.

For example, a user in the Child Protection Team may be allowed to read and update all information stored in the Child Protection module, whereas a user in another Children's team may only be allowed to view a limited summary of the Child Protection information, and have no update access.

A detailed planning exercise may be carried out on each customer site in consultation with CareWorks and a number of Module profiles will be created appropriate to the requirements of the authority. During setup, users will be assigned to the profiles that match their business needs.

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Since each site may have vastly differing profiles, it is not possible to provide a single training manual which exactly matches individual profiles. Therefore this manual is based on the default module profiles that are available with CareDirector Youth "out of the box", before customers apply their own customisations.

Accordingly, the screen shots used in this document may not always be an exact match for the corresponding screen available on a customer site – indeed screens may differ between users on the same site, depending on the number of profiles created for each module. In general, all available fields are shown in the default module profiles, so screens on your customer site will be a sub set of those shown here.

Localisation

Localisation is a feature of CareDirector Youth that allows all the field labels and text in the system to be changed to reflect local terminology and practise. One example of this usage is the translation of screens into Welsh.

Furthermore the population of data in the drop down fields can be fully amended by each Local Authority or HSE.

This training manual uses the standard English terminology and screens of CareDirector Youth. Readers should bear in mind that screen pictures shown in this manual may differ from the screens available on their particular site, if localisation has been implemented.

Workflow

Workflow is designed to allow Raise users to tailor the application to match their business processes. In particular, it allows authorities to define their own requirements for mandatory data fields, and also to specify mandatory processes to be followed.

This manual is based on the use of the default workflows that are available with CareDirector Youth 'Out of the Box'. It should be borne in mind that the workflows implemented on your site may be different and may require different steps to be carried out.

The Personal Details, Referrals, Child Protection, Looked After Children and Leaving Care modules contain actions controlled by Workflow.

Following the default workflow

When following steps for setting up a client, you will receive prompts on actions to take. These actions lead you through setting up a client in YOT by default.

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Example workflow process

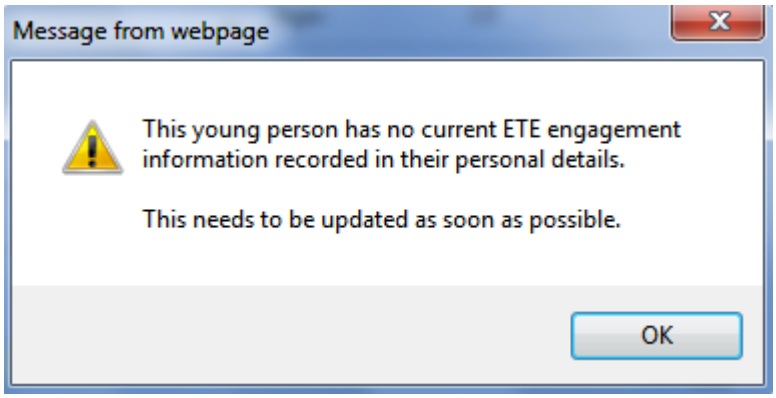
ETE (Education, Training & Employment)

When

- there is a completed Core Asset present against the young person's record, and
- there is no Education record with current dates and engagement completed, and
- there is no Employment record with current dates and engagement completed

Then

Upon entry to the Personal Details screen for that young person's record, the user will be presented with the following message:


Message from webpage
This young person has no current ETE engagement information recorded in their personal details.
This needs to be updated as soon as possible.
OK

The message WILL display if

- Both the Education AND Employment screens are missing records with current information as outlined in the below
- the record(s) have end date(s) completed, but no record with start date only (indicating it is current)
- the record(s) have current dates (i.e.: start date but no end date), but the engagement has been left blank

The message will NOT display if

- there is a record containing current information (start date and engagement completed, and end date blank) in the Education screen, but NOT the Employment screen
- there is a record containing current information (start date and engagement completed, and end date blank) in the Employment screen, but NOT the Education screen

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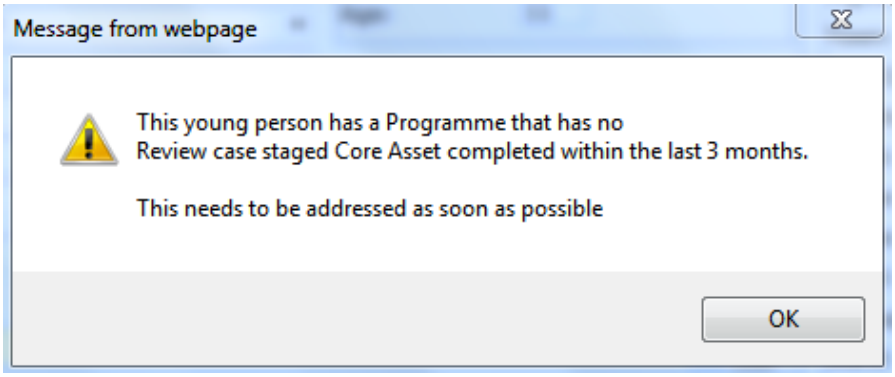
'Review' Case Stage

When:

- there is a Programme/Outcome, and
- there is a Start of Order case stage associated with it, and
- 3 months has lapsed since the last case stage recorded for that Programme/Outcome (regardless of what type that case stage is), and
- There are more than 6 weeks remaining until the Programme end date

Then:

- Upon entry to the Personal Details screen for that young person's record, the user will be presented with the following message:


Message from webpage
This young person has a Programme that has no Review case staged Core Asset completed within the last 3 months.
This needs to be addressed as soon as possible
OK

'Release from Custody' Case Stage

When:

- there is a custodial Programme/Outcome, and
- there is a Start of Order case stage associated with it, and
- the Release Date recorded in the custodial Programme has lapsed, and
- there is no Release from Custody case stage associated with the Programme/Outcome

Then

Upon entry to the Personal Details screen for that young person's record, you will be presented with the following message:

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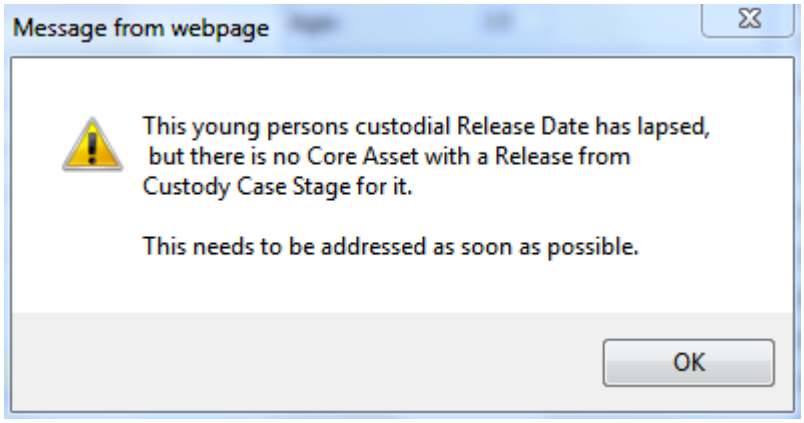

Message from webpage
This young persons custodial Release Date has lapsed, but there is no Core Asset with a Release from Custody Case Stage for it.
This needs to be addressed as soon as possible.
OK

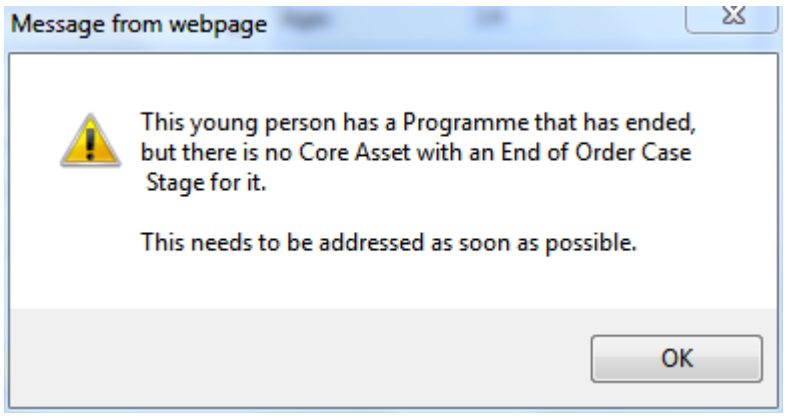
'End of Order' Case Stage

When

- there is a Programme/Outcome, and
- there is a Start of Order case stage associated with it, and
- the Programme End Date has lapsed, and
- there is no End of Order case stage associated with the Programme/Outcome

Then

- Upon entry to the Personal Details screen for that young person's record, you will be presented with the following message:


Message from webpage
This young person has a Programme that has ended, but there is no Core Asset with an End of Order Case Stage for it.
This needs to be addressed as soon as possible.
OK

Following Workflows

The workflows are the default navigation as you complete client profiles in Raise. They are to indicate a required course of action to follow an existing business process.

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Logging onto the CareDirector Youth Application

To start the CareDirector Youth application

1. Browse to your organization's CareDirector Youth installation using Internet Explorer.

   The CareDirector Youth login screen is displayed.

2. Enter your username.

3. Enter your password.

4. Choose Training from the drop down list of databases *(see note below).*

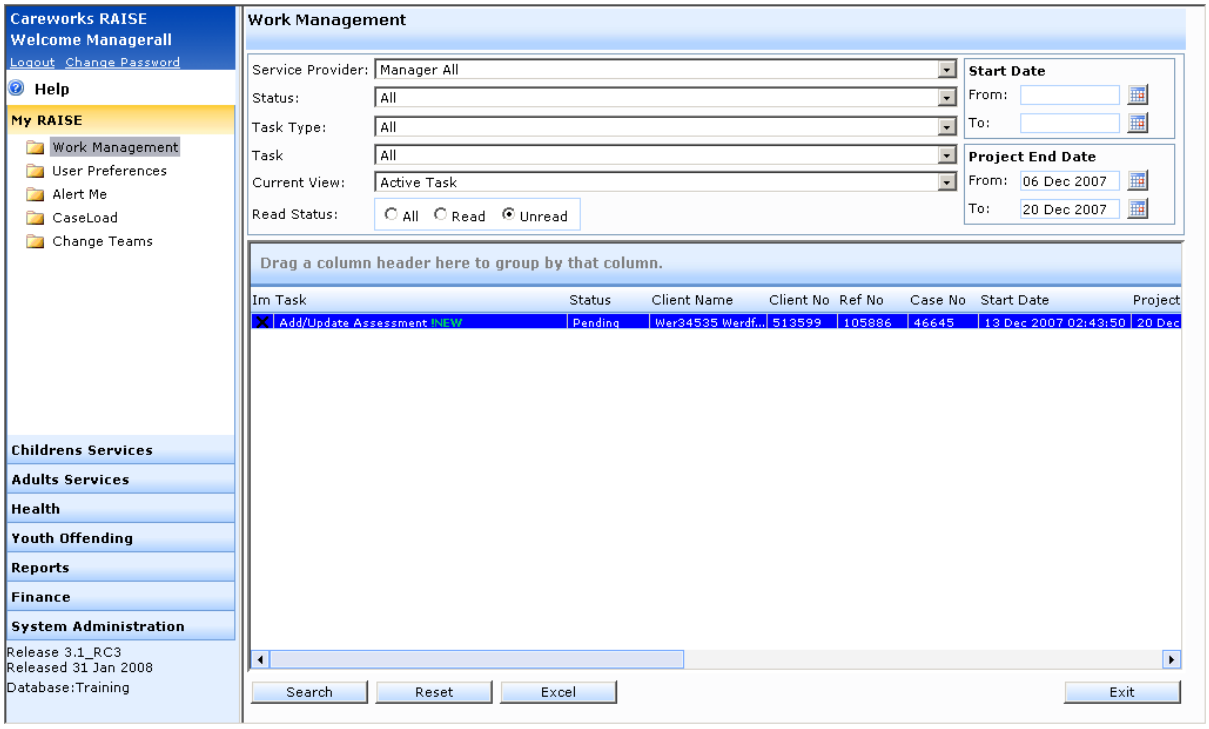
5. Click on logon.

Note: When you return to your office you can use the **Live** system in your normal working environment or you can choose the **Training** database to refresh your skills.

Activity: Log into the CareDirector Youth application using the username and password supplied by your trainer.

A Look at Screen Layout

The first time a user logs on to CareDirector Youth, they are presented with the Work Management screen - the layout of which, is typical of all screens in CareDirector Youth.



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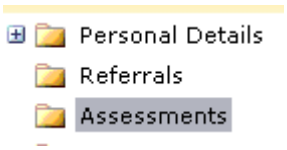
Each screen of the CareDirector Youth application is divided into two: **Modules** are listed on the left-hand side with a **working window** on the right-hand side.

The **modules** are grouped under **menus**, according to the type of service they are relevant to. Each menu is opened by single-clicking on the menu title. The above example shows modules listed under the **My RAISE** menu.

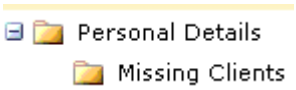
> **Note:** Modules visible to a user will depend on their user access as configured using Profile Based Security.

To go to a **module** simply click on the module name.
For example, to go to the **Assessments** module, click on Assessments in the left-hand window.



Some modules such as Personal Details, Service Placements, Child Protection etc. are made up of sub-modules (denoted by a + beside the module name).

The **sub-modules** can be viewed by clicking on the **+**. The list of sub-modules can be closed by clicking on the **–**. (The **+** changes to a **–** when the list is expanded).



After logging in, the initial **working window** shows the logged on worker's Work Management screen. Users can change this initial screen to match their Personal Preferences e.g. if a user prefers to be presented with a list of current Referrals, they can set that screen as their start-up form.

This course looks at other screens that appear in the working window of the Personal Details, Referrals and Assessments modules, as well as the Work Management module.

> Details about setting User Preferences may be found in Session 6 of this course.

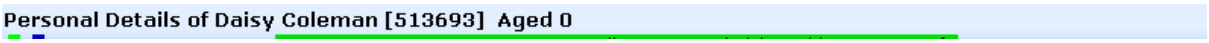
The CareDirector Youth Banners

Fixed Banner

In each of the modules, the top of the working window gives useful information about the current screen.

The banner includes the name of the current module. This information is useful in navigating through the system. If a client has been selected, the banner includes the Name and Age of the client, as well as a Referral Number if appropriate.

Some examples of banners are shown below:



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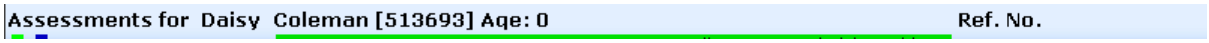
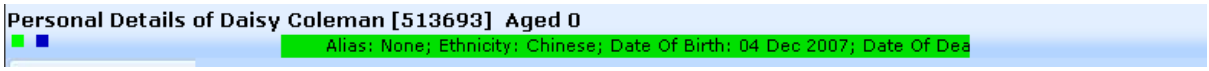


Reminder: Use the banner to find out which module of CareDirector Youth you are currently in and the name of the client you are currently working with. As you move from module to module, the selected client name remains in the banner, as you continue to work with that client in every module until you select another client.

Scrolling Banner

In addition to the fixed banner shown on all screens, it is possible for each user to add an additional 'Scrolling Banner' which displays further information about the selected case, as shown in the example below.



Details about setting User Preferences may be found in Session 6 of this course.

Workflow Banner

In Workflow Enabled modules, the banner includes **up to six** coloured squares that are used to access Workflow Related information or to proceed to the next step in a Workflow. These squares have tool-tips which indicate their purpose. Workflow control is reviewed further in subsequent sessions of this course.

Screen Controls

Saving Changes

Changes entered on any screen in CareDirector Youth are only saved when the Update or Insert buttons have been clicked.

> **Note:** It is not simply a matter of entering the data and moving to another screen. This will not save the data.

General Control Buttons

The Update or Insert button always appears at the bottom of the working window, when a form is being entered or changed, along with other control buttons. The buttons that appear will change, depending on the module being used and the profile of the logged in user within that module. For example, in Personal Details the following buttons may be displayed when an existing record is being viewed.

If there is no client selected, then the Update button is replaced by the Insert button, to add a record once the form is completed.

A different set of buttons is displayed when looking at the Referral list window.

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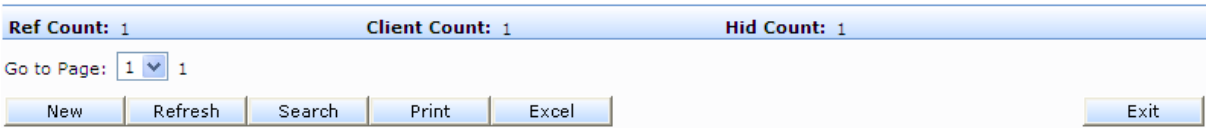


Because this is a list of records, there is no Update button. Details of the buttons on each module will be covered in the corresponding chapter of this manual.

Displaying Records

Records are displayed in a grid.

There are indicators at the bottom of the screen of the records dispalyed:

Ref Count: The number of records displayed on the screen.

Client Count: The number of clients for which records are displayed.

Hid Count: The number of records filtered which the user cannot view as they do not have access.

Remember: Profile Based Security means that the buttons displayed on any screen can be altered to suit the module profile associated with the logged on user.

Button	Used to ….
Update	save changes that have been made to an existing record that is currently on the screen.
Insert	save changes when a new record is being created e.g. new person, new referral etc.
Cancel	Clear current record details off screen – e.g. when wrong client has been selected in Personal Details.
Delete	Delete the record currently displayed on screen – Not always available to everyone.
Search	Search for a record in the current module – i.e. search for a referral if accessed from the Referrals module, but finds a person if used in the Personal Details module.
Refresh	Refresh a list to show default – e.g. when looking at referrals for a particular client, refresh is used to go back to the default list for the logged in user.
Print	Show the list, currently displayed on screen, in Print Preview mode, to allow printing.

Excel	Export the list on screen to an Excel spread sheet, for further analysis using Excel.
Exit	Appears on Referral listing and Work Management screens and may be used to log out of CareDirector Youth.

System Navigation

Note: CareWorks does not recommend copying and pasting text from Microsoft Word or Outlook into CareDirector Youth fields. This can cause error when sending data to YJB if non-standard characters are included.

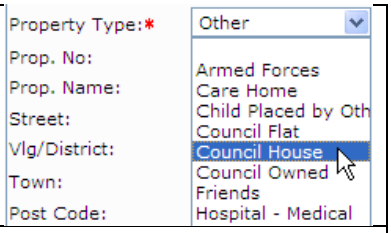
Using the Mouse in CareDirector Youth

Click means to press (once) and release the mouse button without moving the mouse. As the application is browser based, all buttons, icons, tabs and menus are selected by clicking once.

Double click is used only to select a record from a list. For example, in the screen shown below, to open the client details of Helen Flynn, double click on her record in the list, and her details become displayed in the Personal Details screen.

Prev Add	Client	External ID	Client Name	First Name	Middle Name	Surname	Date o
✗	515882		Brian Flynn	Brian		Flynn	17 Apr
✗	514882		Ena Flynn	Ena		Flynn	02 Jan
✗	514881		Garvan Flynn	Garvan		Flynn	02 Jan
✗	515891		Helen Flynn	Helen		Flynn	07 Jan
✗	514903		Kelly Flynn	Kelly		Flynn	01 Jan
✗	514888		Michael Flynn	Michael		Flynn	01 Jan
✗	514880		Pat Sean Flynn	Pat	Sean	Flynn	08 Aug
✗	515881		Shelley Flynn	Shelley		Flynn	04 Jan

Some fields types used in CareDirector Youth:

Drop Down Lists: This is a selection field, activated by clicking the arrow to the right. Select one valid option for the field from those displayed in the drop-down list.	
Check box: A ✓ = a 'True' or 'Yes' value, A blank = a 'False' or 'No' value. Clicking the box toggles the check (mark) on or off.	
Radio buttons: Only one option may be selected at a time. Single clicking a radio button selects the labelled field (and deselects any previously selected option).	

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Date Fields

Dates are required throughout the CareDirector Youth application.

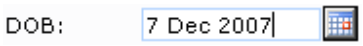
There are two ways of entering dates in CareDirector Youth. Date fields have a data entry facility and a select facility using a calendar.

Option 1: Data Entry

The **data entry** portion allows a date to be typed in e.g.

7/12/07

Once the cursor leaves the field (by pressing TAB or clicking elsewhere) the system fills in the field in the standard format of the CareDirector Youth application.



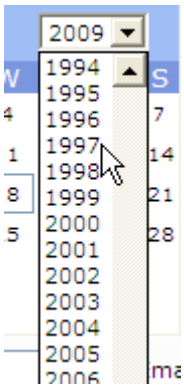
Note: Date can be entered using many formats including: 31/1/1970 or 31/01/70 or 31.01.70 or 310170, but must always be in ddmmyy format.

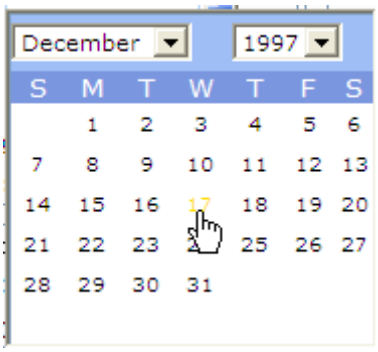
Option 2: Select

Alternatively, the **select** facility can be used to enter dates. Click on the calendar to display the select facility.

calendar

Choose a month from the drop-down list and choose a year from the second drop-down list. Finally click on a number to select the date during that month and year.





Note: Click on the calendar button a second time to close drop-down lists without selecting a date.

Advanced Navigation Features

When entering data to screens within CareDirector Youth it is possible to use the mouse to click on each field, type in the details and click on the next field etc.

- Alternatively, pressing the Tab key on the keyboard can be used to move to the next field.

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- Holding Shift while pressing the Tab Key can be used to move back to the previous field.
- Holding ALT while pressing the Down Arrow key is used to open a drop down list. The Arrow Keys can be used to move up and down through the list. Press return to select the item from the drop-down list.

Idle Time Out

For security reasons, the CareDirector Youth application "times out" if left inactive. In other words after a period of inactivity or idle time it is necessary to log into the system again. A message is displayed as shown.

The time delay before the application times out is configurable by a local IT Systems Administrator.

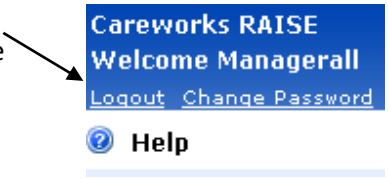
Any unsaved work will be lost when the system times out. When completing the documents generated by CareDirector Youth, the user is not active in CareDirector Youth, only in the document itself. Pressing the Save button within a document saves the changes and is seen as CareDirector Youth activity.

Remember: Changes to any screen are only saved when the Update or Insert button has been clicked. Changes to a document are only saved when the Save button is clicked.

Logging Out

To log out of the CareDirector Youth application and end your session:

- Click on the Logout option on the CareDirector Youth Menu, at the top of the module menu window, under the Welcome message.



Remember: You should always log out or lock the screen when leaving the PC unattended.

Activity:

- Log out of the CareDirector Youth application.

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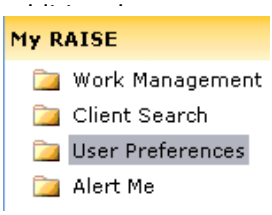
Log into the CareDirector Youth application using keyboard navigation instead of using the mouse.

My RAISE

The *My RAISE* menu contains modules specific to the user who is currently logged into CareDirector Youth, designed to assist that user in their day to day work and in setting up their personal preferences.

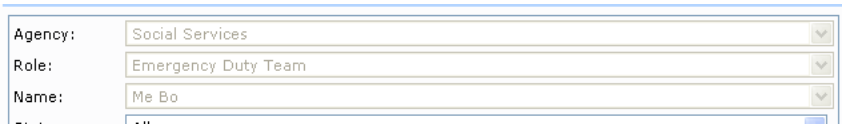
(enabling the user to configure personal alert notifications). There is also a
The modules include Work Management (enabling the user to track their tasks), User Preferences (enabling the user to configure various CareDirector Youth settings), and Alert Me,



Work Management Module

The Work Management module is used to track a worker's tasks. Workflow configuration allows an entry to be placed on the Work Management screen when an activity is created – e.g. when an assessment document is created. The workflow can also set the expected time for completion of the task, causing the user to see at a glance the tasks which are due for completion by a certain date.

It is also possible to view the work management tasks of team members using the Agency/ team/ role pick lists.

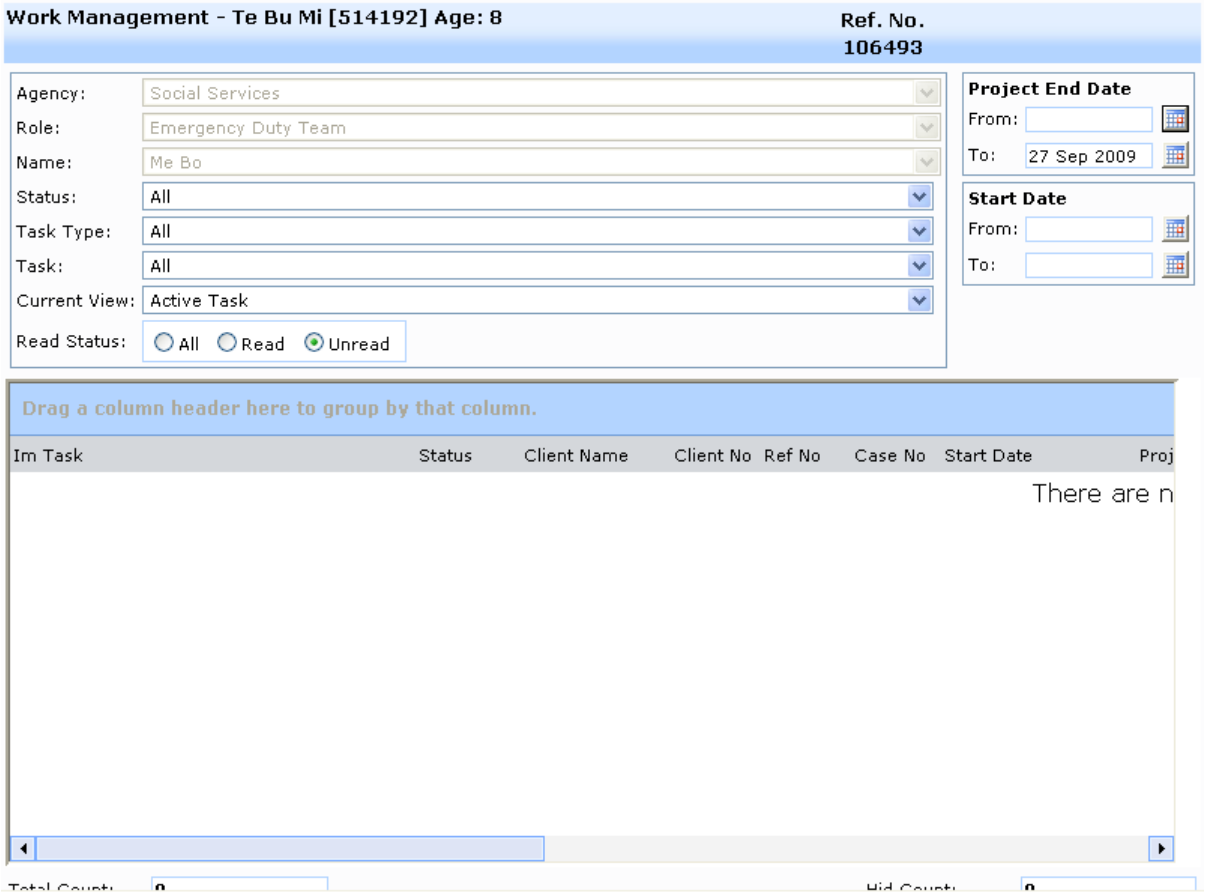


It should be noted that these drop down lists are security controlled and depending on the agreed security within your authority may be limited to only allowing access to the individual workers tasks.

The tasks tracked depend on the workflow configurations implemented on your site.

Work Management is accessed by selecting Work Management from the list of modules in the left-hand window, under the **My RAISE** menu.

When accessed, the screen displays a list of tasks for the logged on user.
status.



There are 4 possible status values as follows:

- **Pending** The task is started.
- **Warning** The task has a due date 2 days from today.
- **Overdue** The task has passed its due date.
- **Completed** The task has been completed – i.e. a document has a completion date or a planned meeting has an Actual Date.

Example of Tracking a Document Status

Assessment documents that are set up using workflow can be given timescales for completion. For example, a document may be set up with a duration of 7 days – i.e. it must be completed 7 days after it is started. Once the document is created, it becomes an active task in the Work Management screen for the worker, with a status of **Pending**. The Start Date is set to the Start Date of the document and a Due Date is calculated based on 7 days from the start date. This due date is also displayed in the Work Management Task List.

Im Task	Status	Client Name	Client No	Ref No	Case No	Start Date	Projected End Date
ICS Initial Assessment NEW	Pending	Henry Coleman	514071	106365	48090	04 Feb 2008 12:00:00	11 Feb 2008 12:00:00

In the example shown above, the Initial Assessment has a duration of 7 days, so the due date is for a document started on the 4th Feb is 11th Feb.

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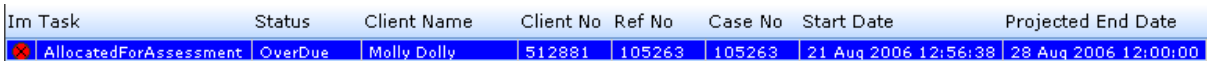
The Work Management module then tracks the progress of the document, changing the **status** as required (see below).

- When a Private Fostering Assessment (PFAAR) is completed within CareDirector Youth (when the end date is entered and saved), this triggers a Work Management task to appear in the Work Management screen, to alert that a Visit Under Regulation 8 needs to take place , by a projected due date, 6 weeks later.

Two days before the task is due to be completed, the status changes to **Warning** .

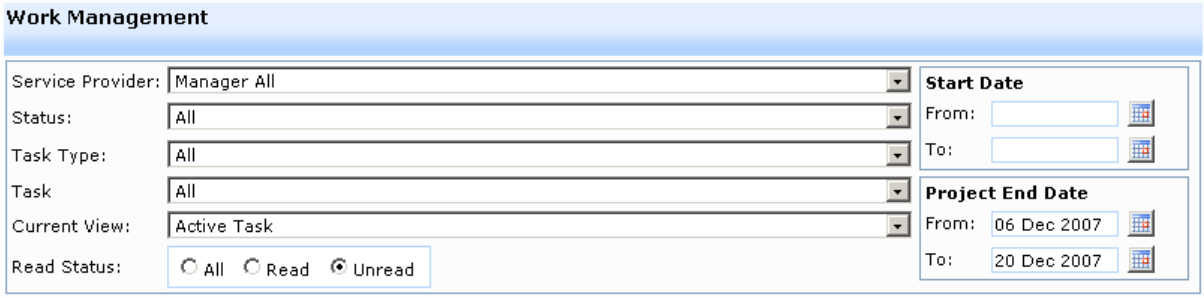
If the task is not closed by the projected due date, the status will change to **Overdue.**



Im Task	Status	Client Name	Client No	Ref No	Case No	Start Date	Projected End Date
AllocatedForAssessment	OverDue	Molly Dolly	512881	105263	105263	21 Aug 2006 12:56:38	28 Aug 2006 12:00:00

Work Management Views

When the Work Management screen is first accessed, the screen displays a detailed list of all pending tasks for the logged on user within a range of Due Dates (1 week before and after the current date).



The **Current View** area can be used to change the view, by selecting the appropriate options. For example, active tasks are tasks which still require completion and selecting the **Read Status: Unread** radio button will display only tasks that are unread.

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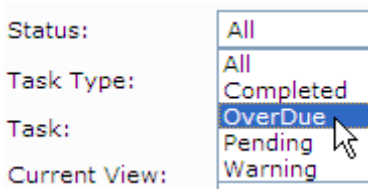
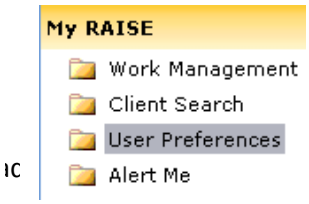
The **Status, Task Type** and **Task** drop-downs can be changed to display all tasks with a chosen status.



The date ranges can be used to filter the task list on a range of **Start Dates** or **Due Dates**.

Updating User Preferences

The User Preferences module is also located under the My CareDirector Youth menu, and has multiple functions:



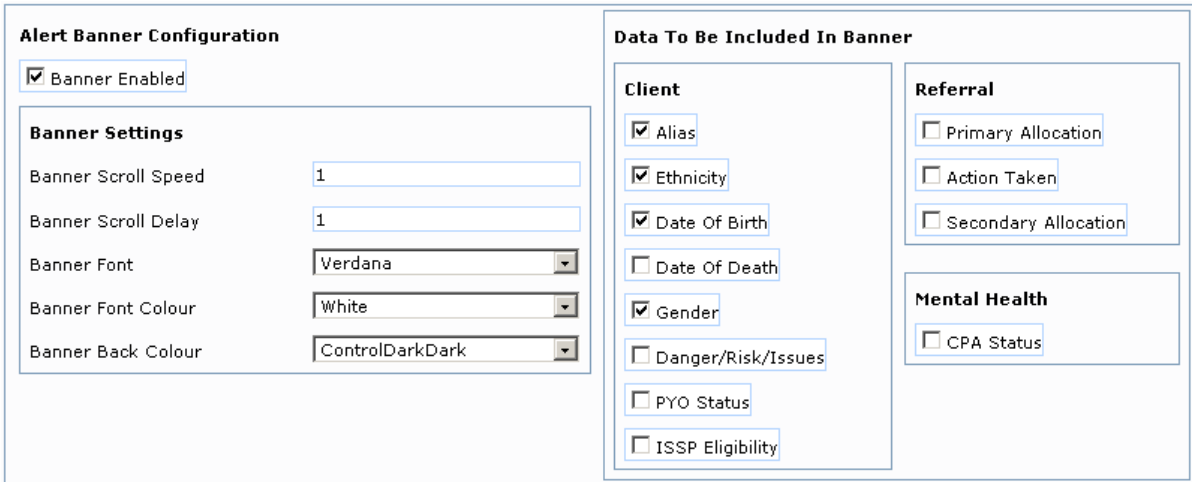
the Personal Details and Referrals module Banners.

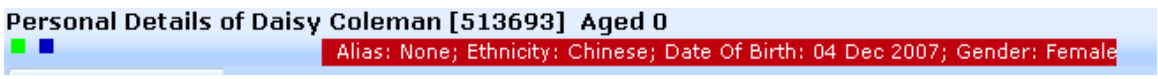
b. To allow the user to choose either the Work Management screen or their Referral List screen to be the **Starting Form** view on login.

c. When a user is a member of more than one team, it allows them to **change the Default Team**.

d. To allow the user to select a **Default Language** for CareDirector Youth.

Alert Banner





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Start-up Form

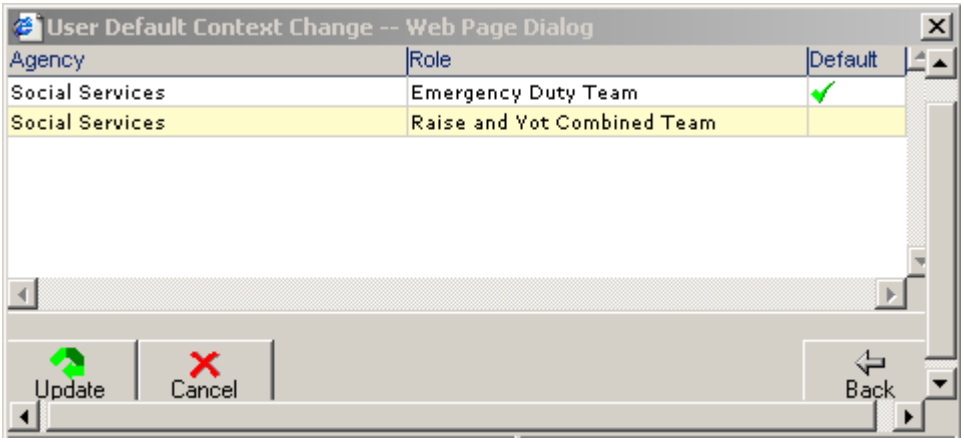
This drop-down field allows the user to change the page that is automatically presented on logon.

The default page that is presented is the Work Management page. If a user prefers to be presented with a list of their allocated referrals, the Referrals List form is chosen as the Start-Up Form.

Note: Remember to press Update to save the changes.

Change Default Team

When a user is a member of multiple teams, the Change Team button in the Change Teams section of User Preferences screen can be used to display a list of all teams to which the user belongs. The current default team is ticked. To change the default team the user double clicks on the new record and presses Update. The Default tick will now be changed.



Changing the default team will ensure that Closure Requests go to the appropriate Team Manager. It also ensures that the appropriate Team/Team Manager name is populated into documents created by the user.

When the user presses Update the system will automatically log them out of CareDirector Youth. When they log in again, the new team will be the default.

Default Language

The user is able to select a default language from the drop-down list of available options.

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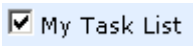
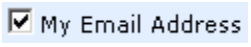
Alert Me Module

The **Alert Me** module is located under the 'My RAISE' menu in the left-hand side of the screen. It allows each individual user to configure when and how an alert will be sent by CareDirector Youth, to the user.

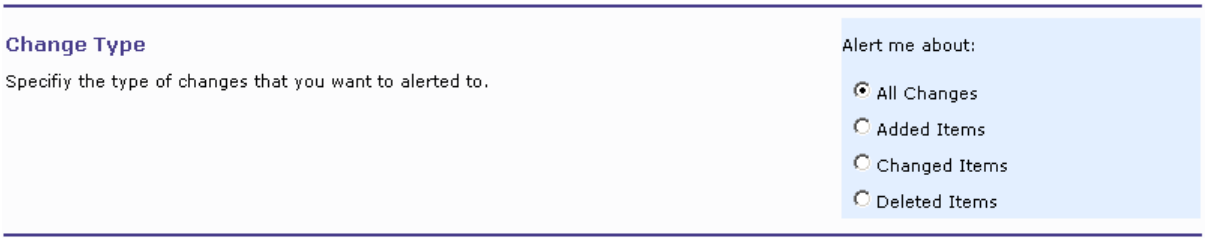
The 'Send Alerts To' section of the screen allows the user to choose **where** the alerts will be sent to.

Ticking the 

check box will cause alerts to appear in the user's Work Management screen.

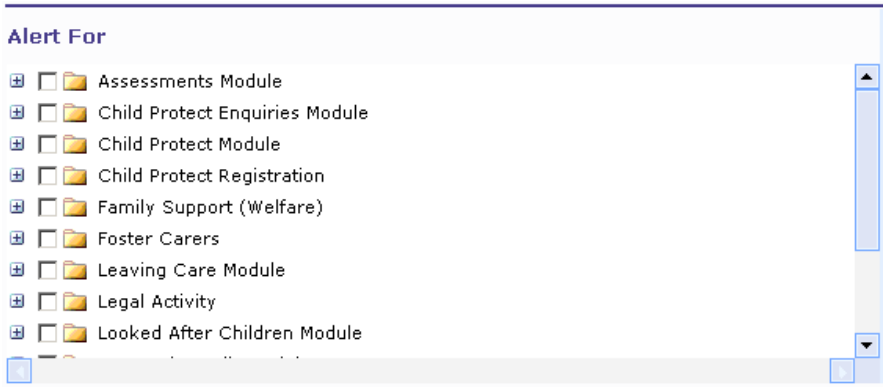
If the user has an email address saved within their User Set Up (under System Administration), then ticking the 

check box will cause alerts to appear in the user's Email inbox.



The 'Change Type' section of the screen allows the user to choose **when** alerts will be triggered, by selecting the relevant radio button.

The 'Alert For' section of the screen allows the user to choose what the alerts will be **about**.



The user can view the entire list by scrolling with the scroll bar and arrows.

The user selects the modules that will trigger alerts, by ticking the relevant check boxes. (The list will display modules the user has access to according to Profile Based Security).

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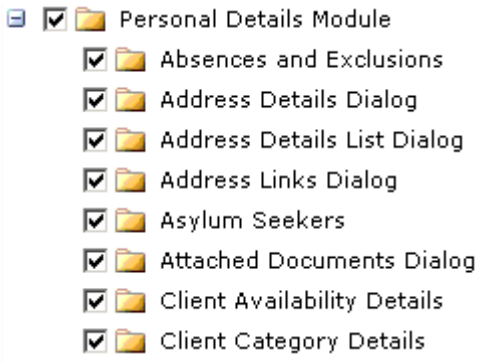
Modules in the list can be expanded by clicking on the ⊞ to reveal an alphabetical list of areas within that module, that can be selected and/or de-selected to trigger alerts.



Ticking and un-ticking the module check box will select and deselect **all** areas in the list under that module.

All areas in the list can be selected or de-selected individually both before and after the module check box has been ticked.

Once the user has ticked the relevant check boxes in each section of the Alert Me screen, clicking the OK button saves the choices.

Cancel removes any unsaved changes, and the screen reverts back to the options that were selected the last time the screen was saved.

You should now be familiar with

- Starting the CareDirector Youth application from the desktop and Logging In
- An overview of CareDirector Youth Security, Localisation and Workflow
- Screen Layout, various controls and navigation within CareDirector Youth
- Logging out of CareDirector Youth
- Using the Work Management module to Manage Tasks
- Configuring User Preferences
- Using the Alert Me Module to set up Alerts

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Chapter 2) Setting up Personal Details

This Session describes how to enter some initial personal details onto the CareDirector Youth system.

Objectives

- At the end of this session delegates will be familiar with
- Searching for a person on the system, using advanced tips to do so
- Setting up a new client and entering some personal details about the client
- Updating marital status and address details for a person
- Adding details of relationships inside and outside the household
- Viewing all people involved with the client

Contents

- Personal Details
- Searching for a Person
- Hints and Tips on Searching
- Entering a New Client
- Updating Personal Details
- Lead Professional
- Relationships
- Involvement
- Summary

Personal Details

The Personal Details module in CareDirector Youth contains client details, details of relationships between the client and other people and details of professionals who have an on-going involvement with them.

Links to address matching and verification software are provided.

The Personal Details module also holds Education and Health details, which may be required when completing assessments during the course of a case.

A facility to record and search against names that the client is “also known as” is provided.

A history of name and address changes is maintained by the system.

Details of any Legal Status record for a client, other than the Legal Status of a Looked After Child may be entered in Personal Details, as well as any other significant event for the client.

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Searching for a Person

In order to update Personal Details a search can be used to find the person on the system.

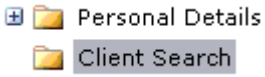
When the user selects the Personal Details module for the first time, on login to CareDirector Youth, the screen presented is the Client Search screen, enabling the user to search before entering a new client, to ensure they are not already entered onto the system. For example, when setting up a new client or entering their family members and other relationships.

Once a client has been selected, and their record opened on screen, clicking into the Personal Details module will present the Personal Details screen for that client.

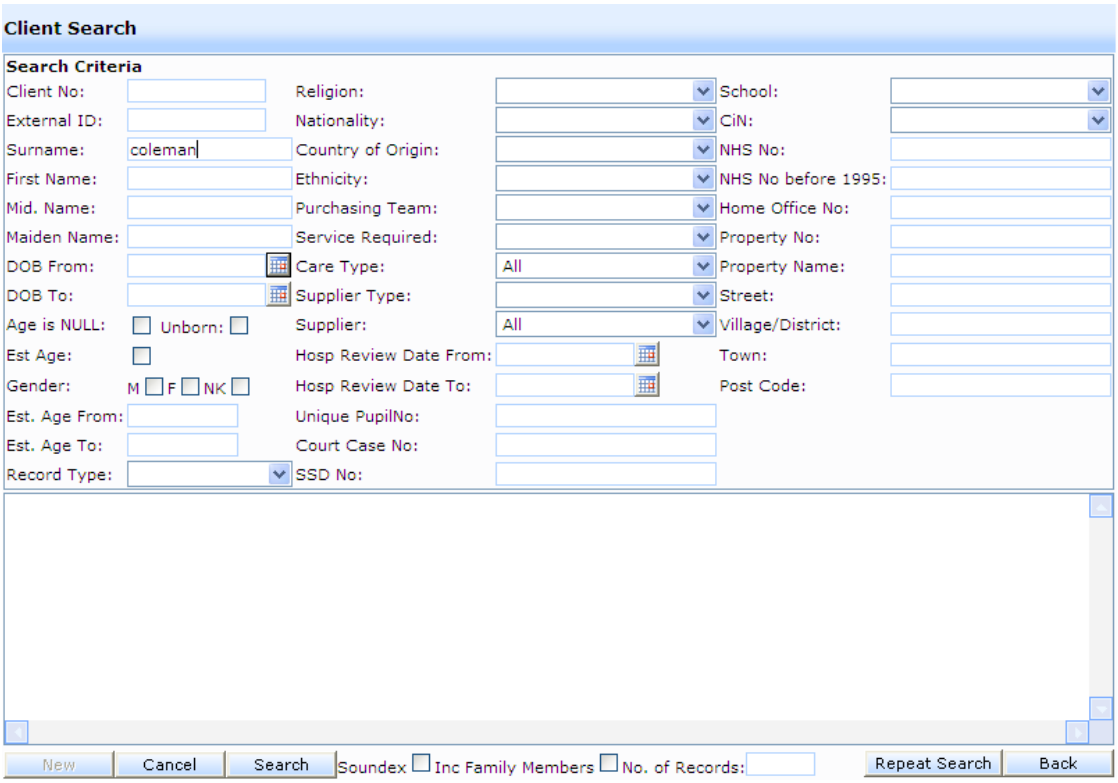
To search for a client within CareDirector Youth from this point onwards after login, the user will select the **Client Search** module.

To Search for a Person

Click on the Client Search module in the left-hand window of the screen, underneath the Personal Details module.



The Client Search screen appears as shown below:



Enter some client details to search on, and click Search.

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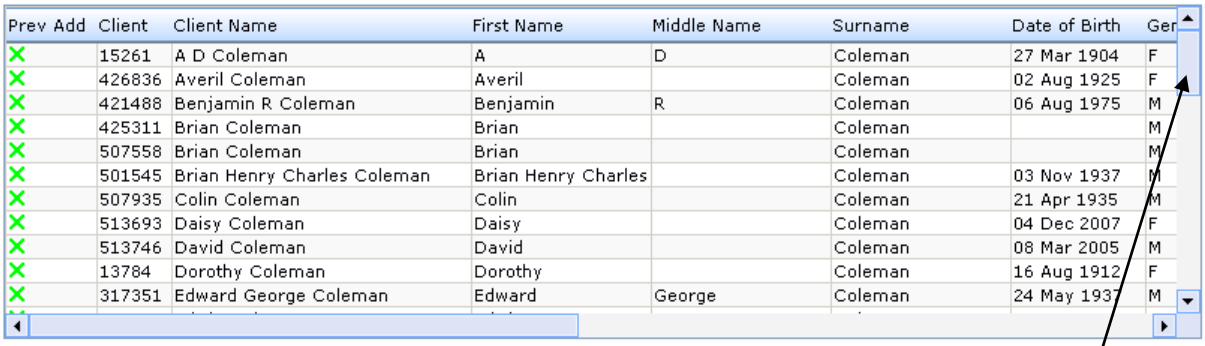
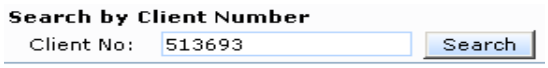
CareDirector Youth will search through its database looking for people who match the criteria and displays the results in the bottom section of the screen.



Prev Add	Client	Client Name	First Name	Middle Name	Surname	Date of Birth	Ger
X	15261	A D Coleman	A	D	Coleman	27 Mar 1904	F
X	426836	Averil Coleman	Averil		Coleman	02 Aug 1925	F
X	421488	Benjamin R Coleman	Benjamin	R	Coleman	06 Aug 1975	M
X	425311	Brian Coleman	Brian		Coleman		M
X	507558	Brian Coleman	Brian		Coleman		M
X	501545	Brian Henry Charles Coleman	Brian Henry Charles		Coleman	03 Nov 1937	M
X	507935	Colin Coleman	Colin		Coleman	21 Apr 1935	M
X	513693	Daisy Coleman	Daisy		Coleman	04 Dec 2007	F
X	513746	David Coleman	David		Coleman	08 Mar 2005	M
X	13784	Dorothy Coleman	Dorothy		Coleman	16 Aug 1912	F
X	317351	Edward George Coleman	Edward	George	Coleman	24 May 1937	M

The user can scroll through the results using the scroll bar and arrows to the right-hand side of the results.

1. Double-click on a line to select the person. Their information will then be displayed in the Personal Details screen. If a number of people satisfy the search criteria, it may be useful to scroll horizontally to view the Date of Birth and Address details to confirm that the correct person is selected, **or**
2. Click on Cancel to close the screen without selecting an individual, **or**
3. Select someone and if when their details are displayed in the Personal Details screen, they are not the client you intended on opening, click on Repeat Search within the search screen, to re-open the same results list (as explained below).



Note: If the CareDirector Youth Client number is known, it can be entered in the **Client No** field on the Search dialog. In this case the Search button in the Top frame is used to search for the person and only one record will be displayed in the Search Result list.

Repeating a Search

If the personal details screen shows that the wrong person has been selected from the Search Results list, the user can click to the **Client Search** module on the CareDirector Youth tree, and click the Repeat Search button. This button causes CareDirector Youth to search using the same criteria as entered in the last search, without re-entering the details on the Search Dialog form.

The Search Results list is re-displayed and the correct person can be selected.

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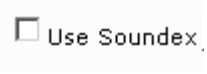
Hints and Tips on Searching

Searching on Surname

To search for people with a surname of Brown, type the word ***Brown*** into the surname field and click on search.

CareDirector Youth will search through its database looking for people whose surname (or **a previous surname** or **alias**) matches the criteria and displays the results:

Using Soundex in the Search



Click the Soundex check box before clicking on search to include "sound likes". It can be used with any of the name fields. For example, doing a soundex search for people whose surname is ***Smith*** will match Smith, Smyth, Smithy, etc.

Using Wildcards in the Search

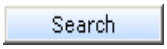
It is also possible to use the wildcard character (*) to search. Wildcards can be used in any of the fields and multiple times. For example: Searching with a First Name of Dan* would find Dan, Daniel, Danny, etc. Searching for a Surname of M*C* finds names like McDonald, MacAfee, March, etc.

Searching is Not Case Sensitive

You may enter the text in uppercase or lowercase.

Activity:

Logon onto CareDirector Youth and go to the Personal Details module. Click on



and find:

- all people on CareDirector Youth with a Surname **Smith** (Hint: Smith can be spelt in a variety of ways)
- all people on CareDirector Youth with a First Name **Mary**

- all people on CareDirector Youth with a First Name beginning with **Ma**. (Hint: Use Ma*)

Entering a New Client

A new client is added to the CareDirector Youth database by inserting their personal details.

Remember: CareDirector Youth functionality will ensure that users have searched before attempting to add a client, to check that the client is not already on the system.

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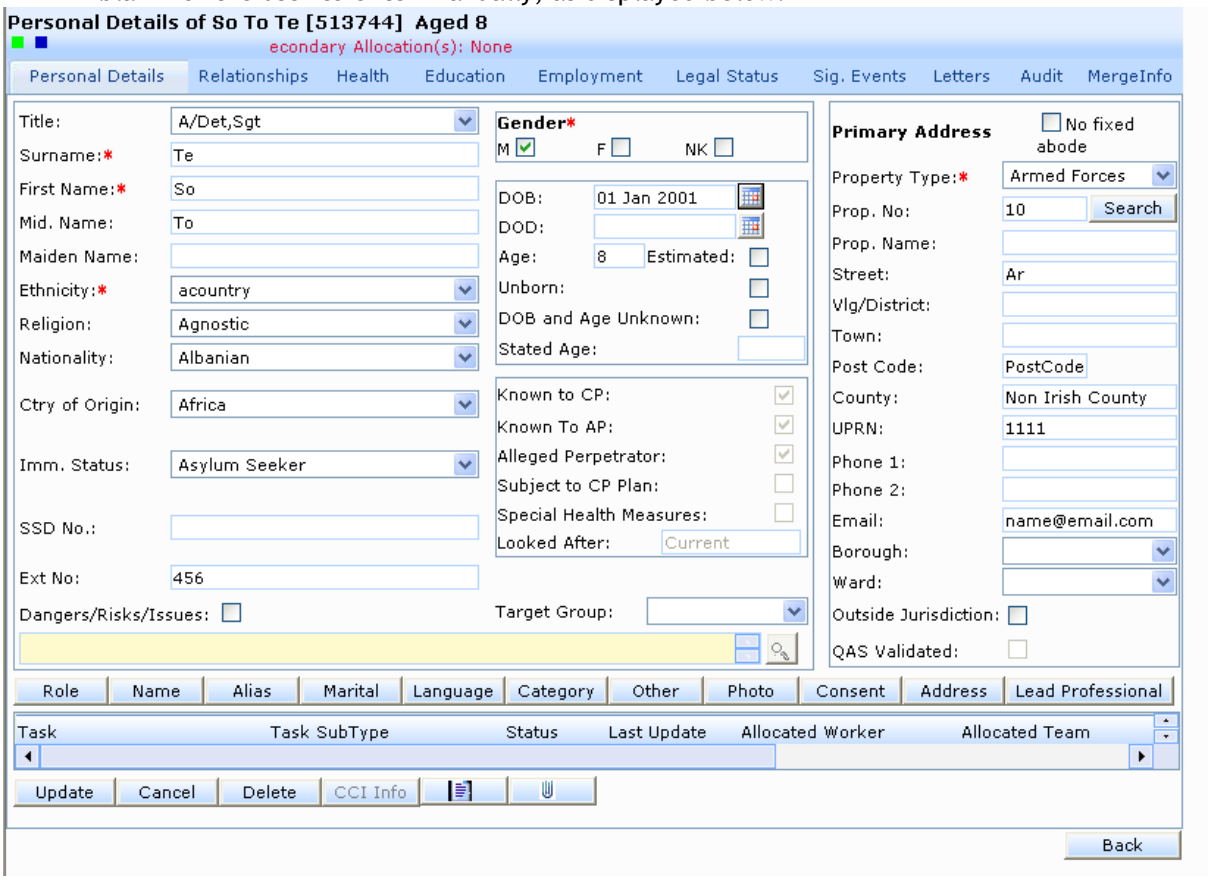
To Set Up a New Client

- On clicking into the Personal Details module without a client record already selected, the user is presented with the Client Search screen.
- If a client is already selected within the Personal Details screen, click on the Cancel button within Personal Details. A message will ask "Do you want to clear the current record?" On clicking OK to continue, the user is presented with the Client Search screen.
- Alternatively, users can click straight to the Client Search module on the CareDirector Youth tree at any time, to search for a client record.
- If the client does not appear within the results following a thorough search, clicking on the New button opens a new Personal Details screen, to enable the user to create a new client record. The search criteria entered for the client search, are automatically populated into the Personal Details screen, while all other fields are blank for the user to enter manually, as displayed below:



Note: Mandatory fields are marked with a red asterisk and depend on the configured Workflow (*).

- Fill in a **Surname** and **First Name** by typing the details into the fields.
- Fill in the **Ethnicity** by selecting one from the drop-down list.
- Click one of the tick boxes for **Gender** to select Male, Female or Not Known.
- Fill in a Date of Birth or an Estimated Age.
- **Target Group** can be used to record whether or not the client is a traveller.
- Select a **Property Type**. You can select a property type from the drop-down list.
- Fill in a Primary **Address**.
- The **Outside Jurisdiction** checkbox should be ticked if the client is ordinarily a resident outside of England (this information is required in relation to Contact Point).
- Complete any other Personal Details that are known at this stage.

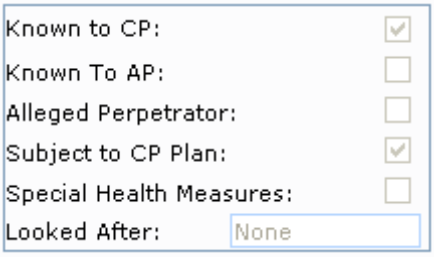
- Click on Insert to add the client to the database.

In most default Workflows, this completes the process of adding a person to CareDirector Youth. In custom workflows which require further screens to be completed, the user will be presented with the screen for the next step in the Workflow – e.g. the Client Role screen.

Note: When adding a person, if multiple workflows are available to the user, a pop up dialog will display asking them to choose the appropriate workflow, after they clear any selected client details from the screen.

Alert Information

In the centre of the Person Details screen are a number of tick boxes and one text box that provide alerts for users as to whether a person's record has the following information held elsewhere in CareDirector Youth.



The information stored in these fields is entered in other screens and tabs within CareDirector Youth and when entered the tick or text will display here. Entering the different elements of information will be covered elsewhere in CareDirector Youth documentation but to summarise:

Known to CP This tick box will be auto completed when a Child Protection record is current within the Child Protection for a child e.g. a Child Protection Enquiry

Known to AP This tick box will be auto completed when an Adult Protection record is current within the Child Protection for an adult e.g. an Adult Protection Enquiry

Alleged Perpetrator This tick box is auto completed when an Adult Protection Enquiry is recorded and in the "abuse" tab of the Adult Protection module

Subject to CP Plan Tick box is auto completed when a current Child Protection Plan document is present on a Childs record.

Special Health Measures Tick box is auto completed when there is text in the "Special Measures" field within the "Health" tab of Person Details.

Looked After This field populates with the current status of any LAC legal status record. This will be either "Current", "Historic" or "None".

Activity:

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Enter the following new clients. Check with your trainer who will give you a surname to use (or use your own surname).

First Name: **Mary**

Surname: "See above"

Ethnicity: **White British**

Gender: **Female**

Estimated Age: **45**

Street: **Main Street**

Town: **New Town**

Phone 1: **07867 111111**

First Name: **David**

Surname: "See above"

Ethnicity: **White British**

Gender: **Male**

Street: **Main Street**

Town: **New Town**

Date of Birth: **1/1/2001**

Updating Personal Details

The main categories of information recorded on CareDirector Youth are:

Client Details (Names, Addresses, Aliases, Personal Characteristics etc.).

Relationships (Inside and outside the household).

Health Details (GP, Disability/Impairment, Hospital, Immunisation, etc.).

Education (Schools attended, Examinations, Special Education Needs etc.).

Significant Events (Family events, Court Proceedings etc.).

Other Involvements (i.e. other services being provided to the client).

Personal details can be updated or added for any person on the system. In this session we look at two examples, how to update marital status and how to update address.

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See Also: Session 5 Updating Personal Details.

Note: on the Insert **and** Update **buttons:**

The Insert and Update buttons appear throughout CareDirector Youth.

The Insert button is used to add new information (e.g. a new marital status).

When a record is selected, the Insert button changes to a Update button. This allows changes to be made to the selected record.

If a record has been selected in error the Cancel button can be used to cancel the selection (and the Insert Button becomes available again).

Changing Marital Status

A marital status can be recorded when the person is set up on CareDirector Youth. Marital Status can also be recorded or updated at a later time.

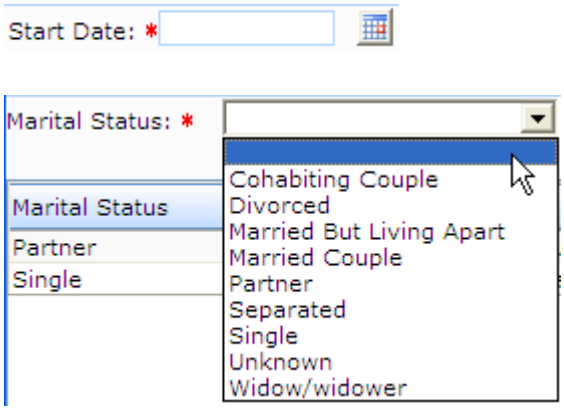
Select the Personal Details of the person.

Click on the Marital button on the Personal Details screen. Marital

This displays the Marital Status History screen.

To Record a Marital Status

- Choose a Start Date.
- Select a marital status from the drop-down list.
- Click on Insert to add a new Marital Status.
- Click on Back to return to the Personal Details screen.



Marital Status History

The screen displays a history of changes in Marital Status for this person.

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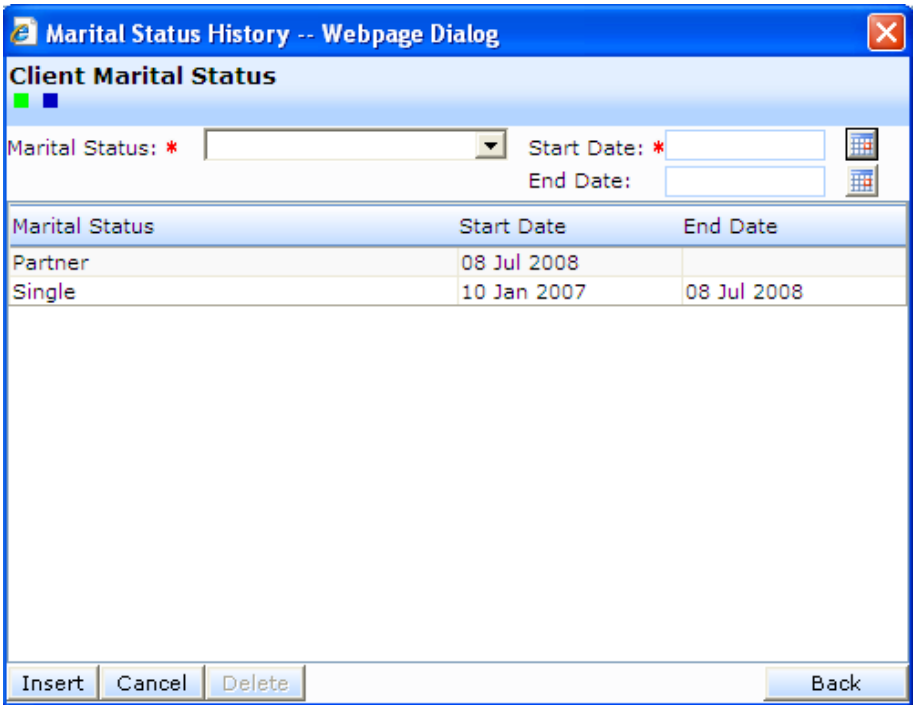

To Delete a Marital Status Record (usually one entered in error):

- Click on the record to be deleted.
- Click on the Delete button. Click on OK to confirm.
- Click on Back to return to the Personal Details screen.

Activity:

- Select the client details of Mary _____ added earlier in this session.
- Add a Marital Status of **Married Couple** with a Start Date of 14th February 2004. We will add details of her husband later in this session.

Change of Primary Address

The Primary Address of a client is updated from the Personal Details screen:

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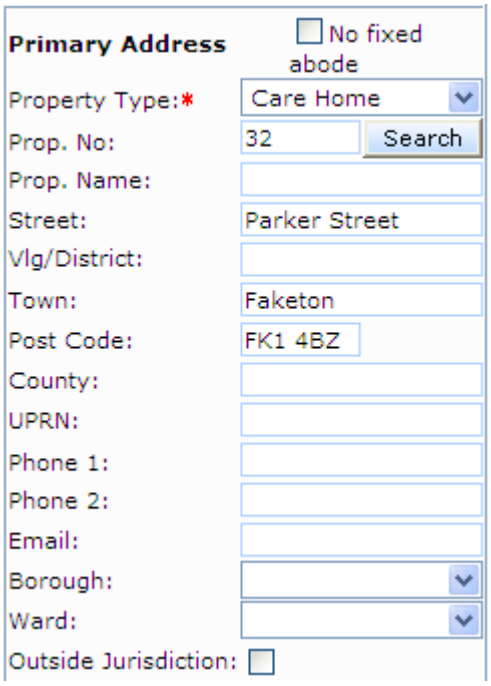
- Type in the new details by typing over the previous details in Property No, Property Name, Street etc.
- The **Search** button can be used to consult the gazetteer and check or complete an address.
- Click on Update to save any changes.



Note: Not all system users will have access to a gazetteer.

You can select **Unknown** from the **Property Type** drop down list if the client address is not known, or if the client is missing, for example. If unknown is selected, the address fields are still editable so the user can complete a partial address if the information is known.

The Outside Jurisdiction: checkbox under the Borough and Ward fields should be ticked if the client is usually resident **outside of England**. This information is required in relation to Contact Point.

The Address History Screen

Previous Addresses are all retained by the system and can be viewed by clicking on the Address History button on the Personal Details screen.

Address

A range of **Other Addresses** can also be maintained for each client. These addresses are also available from the Address History screen.

Click on the **Address** button on the Personal Details screen to open the Address History screen.

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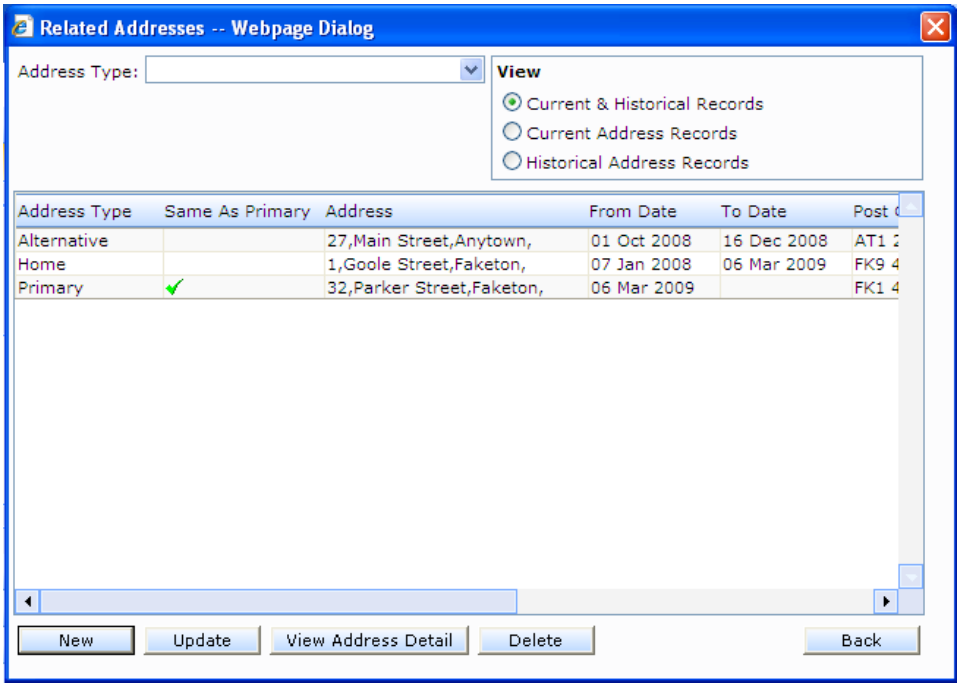

- By default Current Address Records are displayed.
- Click beside **Historical Address Records** to see previous addresses.
- Click beside **Current & Historical Records** to see **all** the address information (current and historical).

Recording Other Addresses

Click New to enter additional addresses such as a **Care Address, Home Address** or **Temporary Address.** The drop-down list for **Property Type** field allows the user to select the type of address e.g. LA Care, Other Family etc.

Recording Historical Addresses

Click New to enter the additional address. After inserting the address click on the record and View Address Detail to display the details. Add the From and To Dates and press the Update button to record the historical dates.

Activity:

David has regular periods of weekend respite care at Home from Home Centre, 2 Main Street, Sometown.

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Add a care address for David (the child set up earlier), by selecting the Personal Details of the client and clicking on the Address History button to go to the Address History screen.

Lead Professional

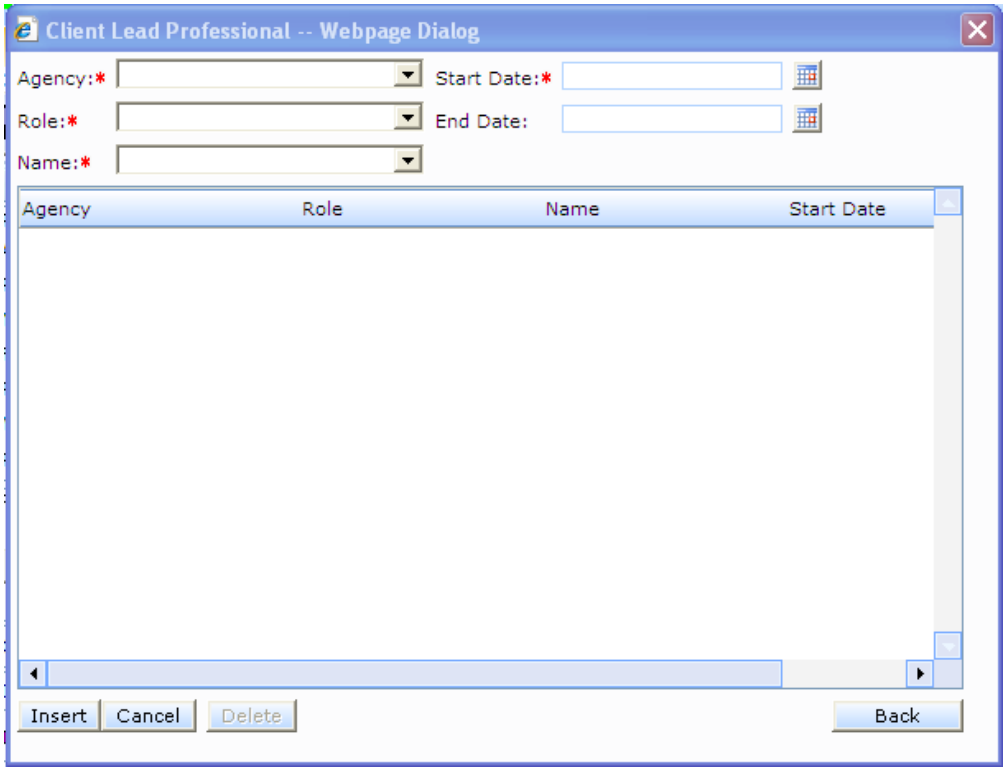
On clicking the Lead Professional button at the right hand side of the **Personal Details** screen, the user will be presented with the Lead Professional screen, enabling them to specify or view the lead professional for the currently selected client.

The Lead Professional button is also located in the **Referral Allocation** screen and the **Secondary Allocation** screen, as outlined in **Fundamentals Session 5** for the Referrals module. These routes enable the user allocating the referral to record the lead professional for the case at the point of allocation.

Having an access route to the **Lead Professional** screen from the **Personal Details** screen enables the Lead Professional information to be maintained for clients in situations where there are no current referrals for the client, and/or where a user does not have access to any of the client's referrals. This route can also be used as a shortcut to obtain Lead Professional information quickly after searching for a client, without having to first locate a referral.

On clicking a Lead Professional button, the user is presented with the same screen, to record new and/or view all entries that have been recorded previously, regardless of which Lead Professional button has been used.

The Lead Professional screen displays as shown below:



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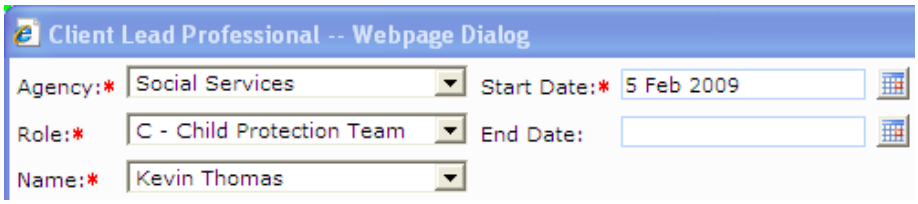
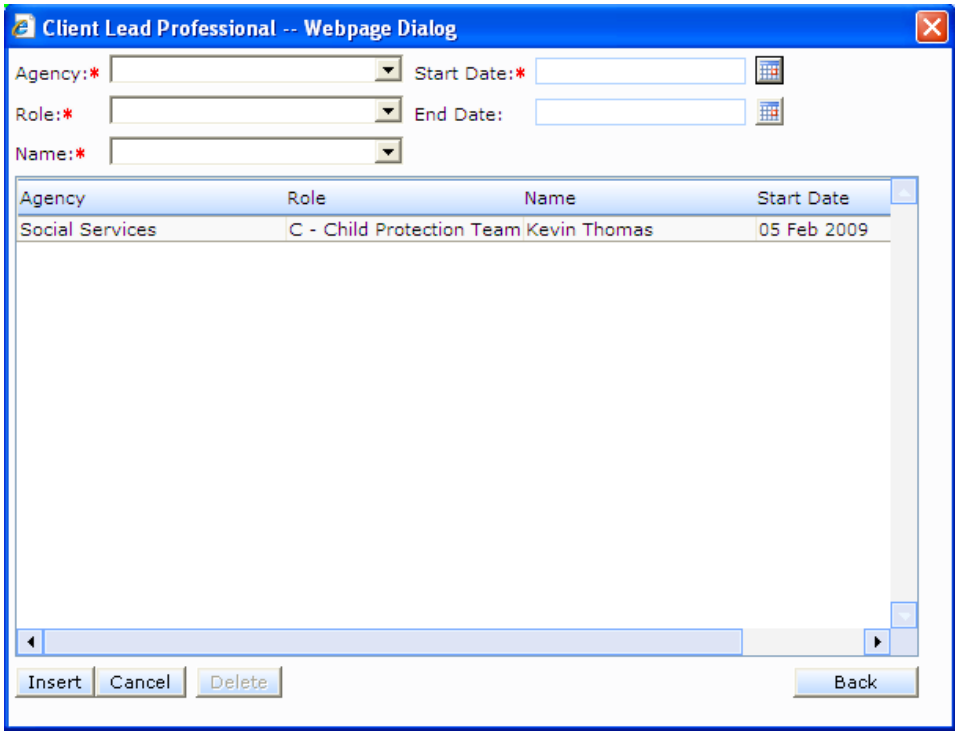
The **Agency**, **Role** and **Name** fields are mandatory, and these fields display values according to the Systems Administration Team, Role and Staff Set Up, as in all other locations throughout CareDirector Youth where these fields are displayed.

The **Start Date** is also a mandatory field in order to indicate a particular point in time for the current (and in time, historical) Lead Professionals.



The **End Date** is an optional field, enabling users to complete it as and when the end date for the current Lead Professional becomes known and/or relevant.

On clicking Insert the user is presented with an information message to confirm that the record has been inserted successfully, and the Lead Professional details display in the grid listing as shown below:



Note: On accessing any of the Lead Professional buttons, all Lead Professional entries (both historical and current) will be displayed, regardless of which screen the button was accessed in, to record the original entry.

If a record is selected when the user clicks the Cancel button, then the record becomes deselected, and all fields in the screen will become blank once again.

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If the user has entered some information into the fields in the screen when the Cancel button is clicked, then all fields will become blank and the information entered will not have been saved.

If a record is entered in error, the user can single click on the record in the list to highlight it and the Delete button becomes enabled. On clicking Delete, the user is presented with a message to ask whether they are sure they wish to delete the record. On clicking OK to the message, the Lead Professional record is deleted from the list, and the user is presented with a message to confirm the successful deletion.

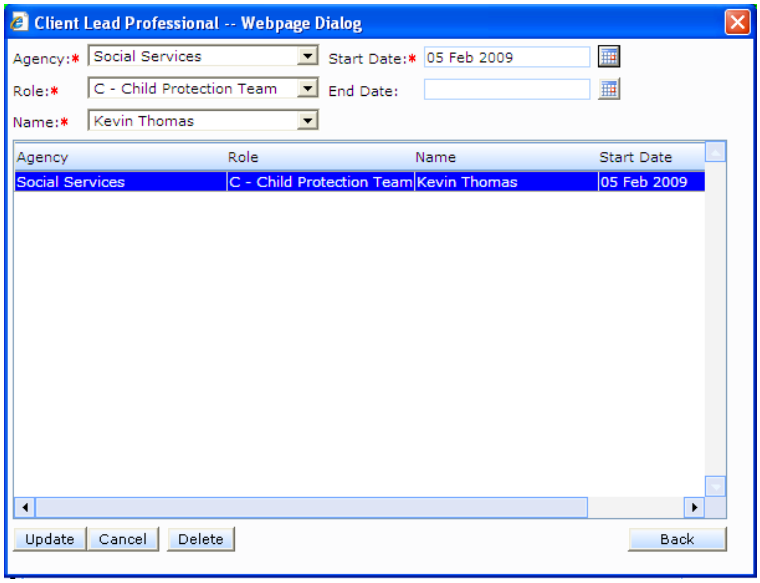
Clicking the Back button within the Lead Professional screen returns the user back to the Personal Details screen.

Updating the Lead Professional

If and when the Lead Professional changes, users will need to record further entries to the Lead Professional screen (rather than updating the existing record), in order to retain historical Lead Professionals information in addition to recording the current one.

On clicking the Insert or Update button on the Lead Professional screen, an automatic validation will run to check that there are no **overlapping** Lead Professional records, and ensuring that only one entry can be recorded as the current Lead Professional at any given time.

The **current** Lead Professional will be recorded with a mandatory Start Date, but no end date as shown in the example below (or with an optional End Date in the future if known).



Before adding an entry for the **new** Lead Professional details, the user should update the existing entry for the **current** Lead Professional by recording an End Date.

If the **current** Lead Professional has no end date when the user attempts to insert a **new** Lead Professional record, they will be presented with an error message, as shown below:

On clicking OK to the message, the user is returned to the Lead Professional screen to make the necessary amendments.

Role	Name	Start Date	End Date
C - Child Protection Team	Sonia Rousseau	07 Feb 2009	
C - Child Protection Team	Kevin Thomas	01 Feb 2009	06 Feb 2009

The Lead Professional grid list displays in chronological order by default, with the most recent/current Lead Professional at the top of the list.

Note: The End Date of one Lead Professional cannot be the same Start Date for another Lead Professional. Different dates must be used, as shown in the example below.

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Relationships

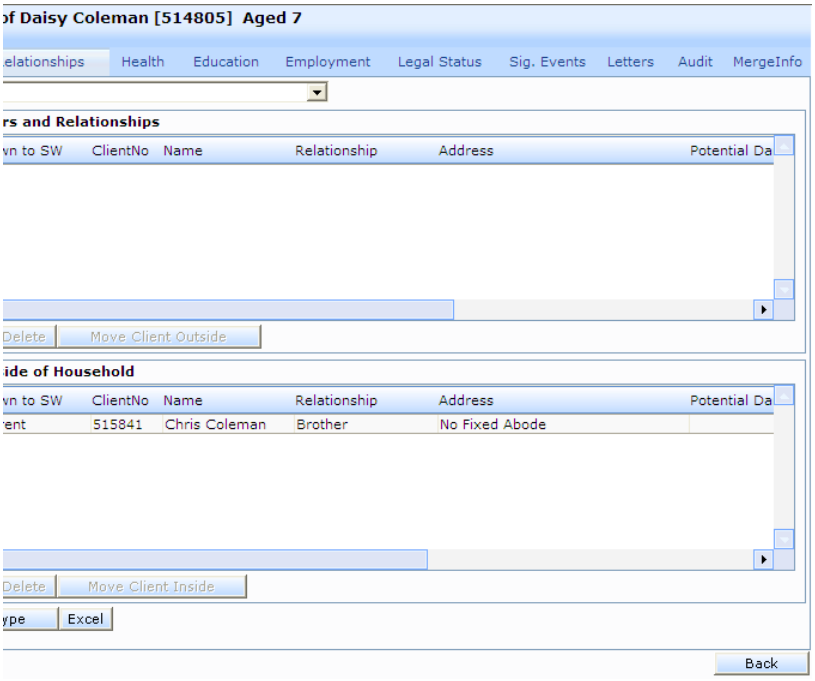
Within the CareDirector Youth application there are two types of Client Relationship which are used to record family members, significant others and parties involved: **Relationships within the household**; and **Relationships outside the household**.

- When adding a relationship there are two further possible circumstances:
- The person already exists on CareDirector Youth.
- The person does not yet exist on CareDirector Youth.

Clicking on the Relationships tab displays existing relationships (if any have been recorded on CareDirector Youth).

To add a Relationship **Inside the Household**, click the top Insert button.

To add a Relationship **Outside the Household**, click the bottom Insert button.



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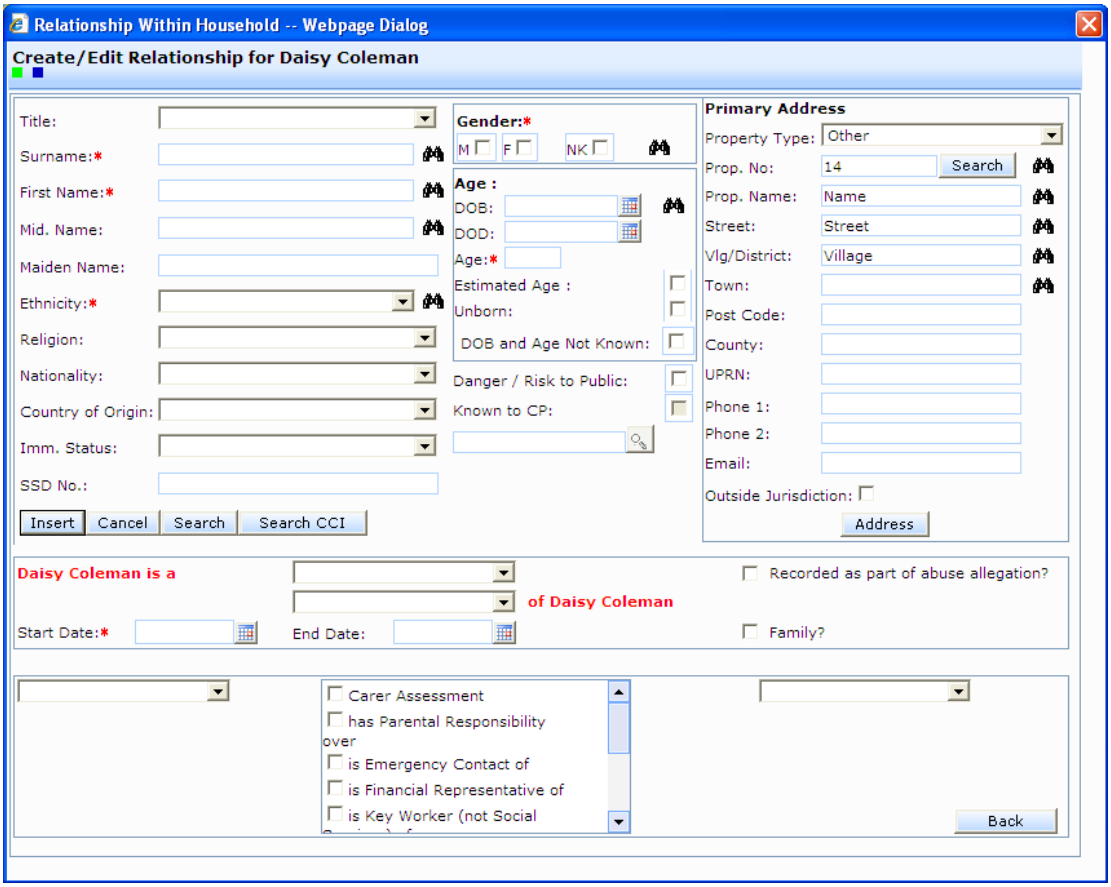
In each case the following screen is displayed:



Step 1 : Searching CareDirector Youth to see if the Person Already Exists on CareDirector Youth

- Enter the search criteria and click Search.
- This retrieves any clients who match the criteria.
- Double-click on a line to select the person **or**
- Click on Cancel to close the screen without selecting an individual.

Note: When adding a relationship inside the household, the system automatically populates the address fields. You may wish to clear the address and repeat the search to check if the client has been entered with a variation on the address.

If the Person Does not yet exist on CareDirector Youth

- Fill in the client details click on Insert to enter the person on CareDirector Youth.

If the Person Already Exists on CareDirector Youth

The system retrieves the client details and displays their details on the upper part of the Relationships screen at the end of the search.

Step 2: Filling in the Actual Relationship

Once a client has been selected or inserted in step 1, their names are populated on the middle panel of the screen:

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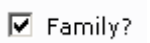
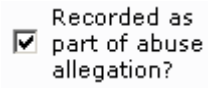
Enter the actual relationships using the drop-down lists.

- Enter Start and End Dates if this is an historical relationship.
- If the relationship being entered is a family member, tick 

.
- If the relationship being entered is alleged to have abused the client, tick 

.
- Click on

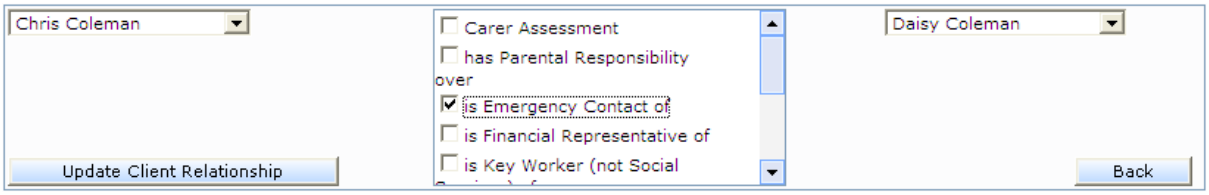
to save the details.

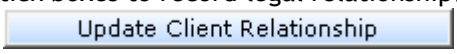
Step 3: Legal Relationships

Recording a Legal Relationship is optional on CareDirector Youth.

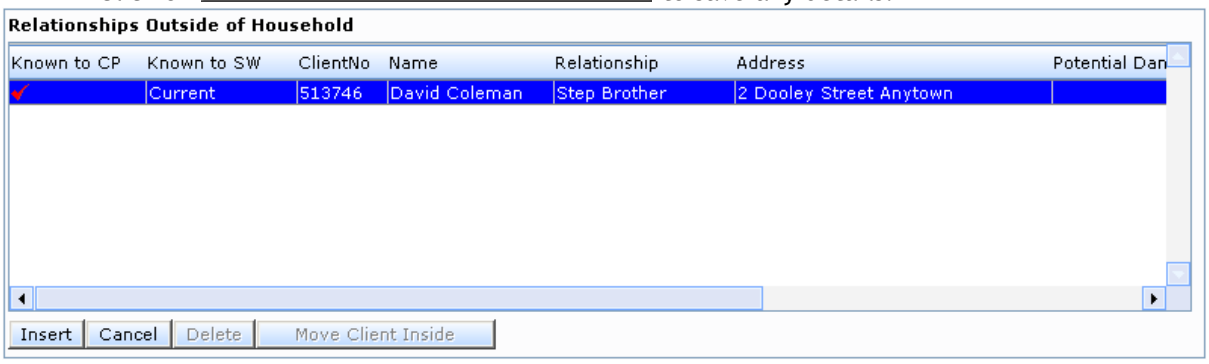
The bottom portion of the screen may be used to store information about legal relationships.

The values here depend on the category of the user and may include those shown below:

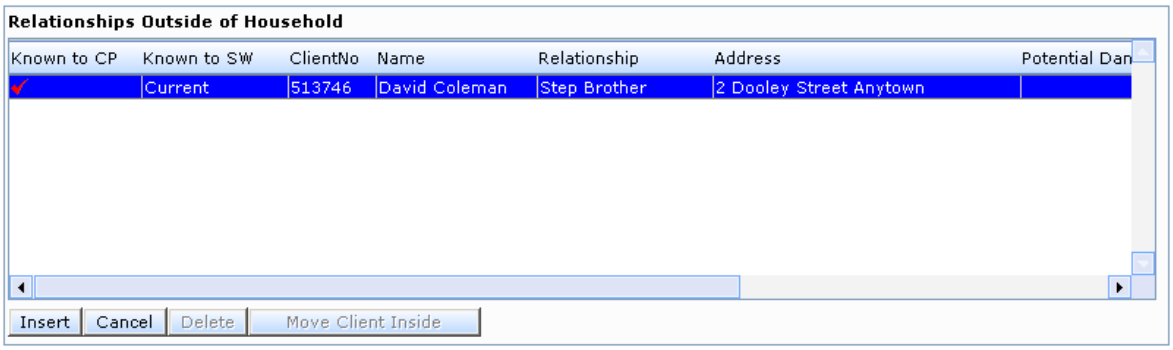


- Select the names from the drop-down lists.
- Use the tick boxes to record legal relationship(s).
- Click on 

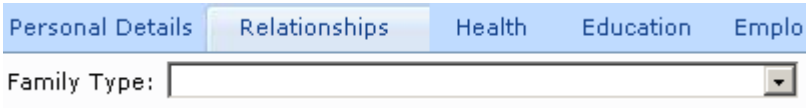
to save any details.



If the Related person is known to the Child Protection team, the “Known to CP” column displays a red tick.



At the top of this screen there is a field called 'Family Type'. The family type relevant to the client is selected from the drop down list.



Whenever a family type is selected in this field, the Update Family Type button at the bottom left-hand corner of the screen saves the change when clicked.

Other Buttons on Relationships Screen

There are a number of other buttons on the Relationships screen which function as described below.

Move Client Outside	When a relation inside the household is selected, this button moves the selected relation to the list of "Relationships outside the Household". Note that this does not change the address of the related person. To update the related person's address, their record must be selected in Personal Details and updated as previously described.
Move Client Inside	When a relation outside the household is selected, this button moves the selected relation to the list of "Relationships inside the Household". Note that this does not change the address of the related person. To update the related person's address, their record must be selected in Personal Details and updated as previously described.
Delete	When a relation inside or outside the household is selected, this button removes the relationship – however, the related client record is not deleted.
Excel	The Excel button allows any list to be exported to an Excel spread sheet, for printing or analysis.

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Involvement

The Involvement screen allows a user to view those people / agencies / suppliers involved with a client.

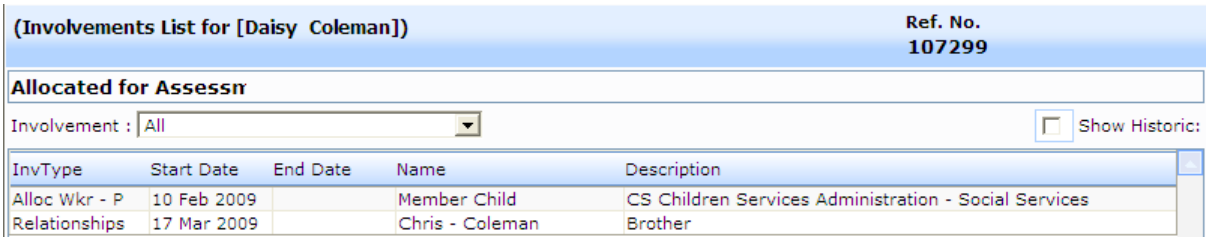
This screen is a view only screen and allows a user to see a snap shot of who is currently involved with the client. The information is populated into this screen when specific areas within the system are entered into the following areas:

- in the CareDirector Youth relationships
- as allocated workers
- in the Health Professionals
- Suppliers
- Education
- Employment

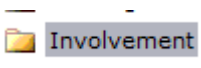
Access to the Involvements module is set up using Profile Based Security (PBS).

> **Note:** It is also possible to hide specific relationship types through PBS.

A list of client Involvement can be seen by either having a selected person as seen below or by searching for the client from within the Involvement module.



Searching for a Person in the Involvement Screen

Click on the 

module and the screen below is presented:

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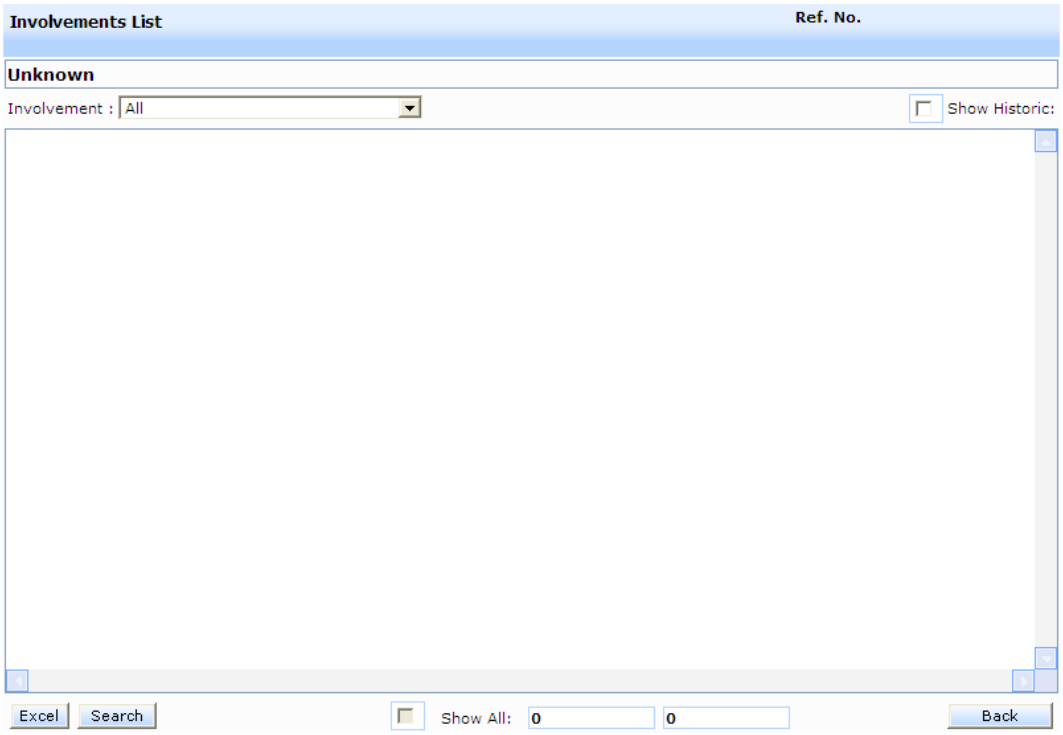
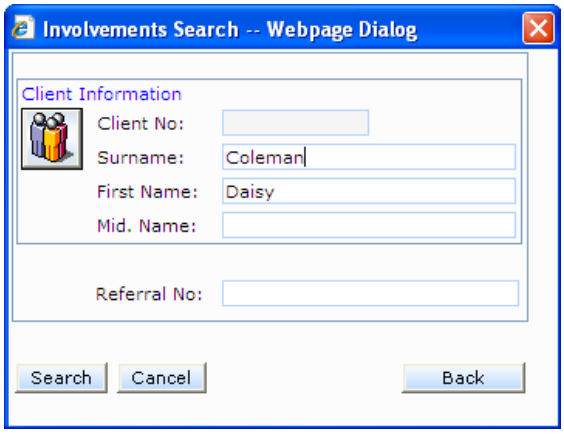


To search for your client click on the Search button from within the Involvement screen.



Record the client's details in the *Involvement Search* screen and then click to search for the client. The search result screen returns all relevant results found. Double-click on the relevant person line.

Note: A client can also be found by using the referral number if known.

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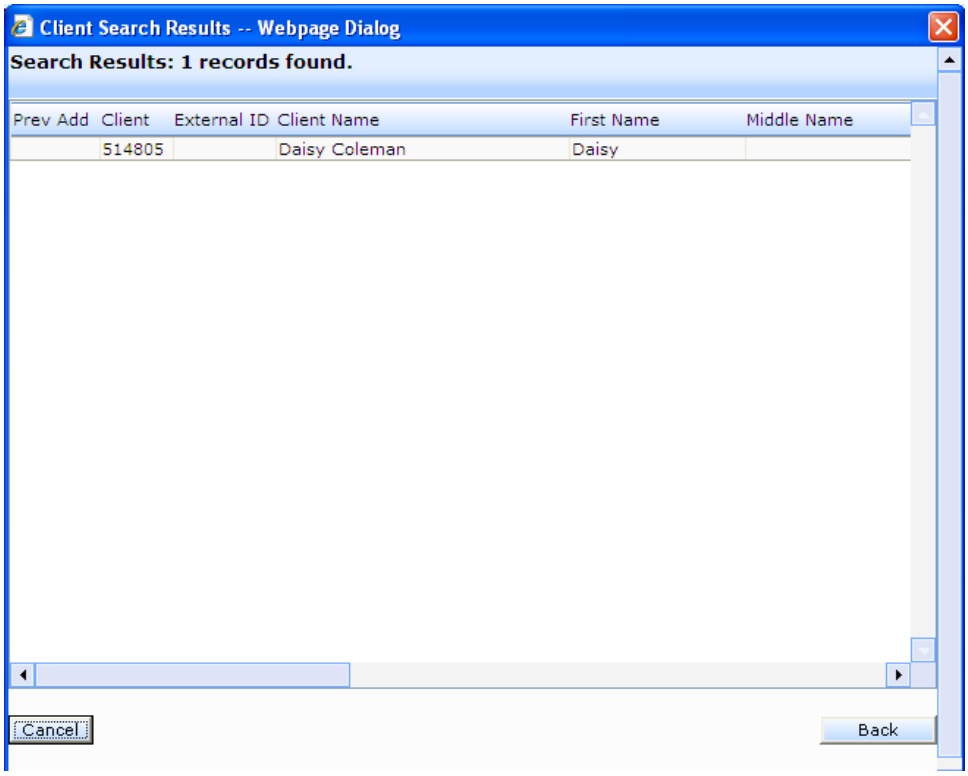
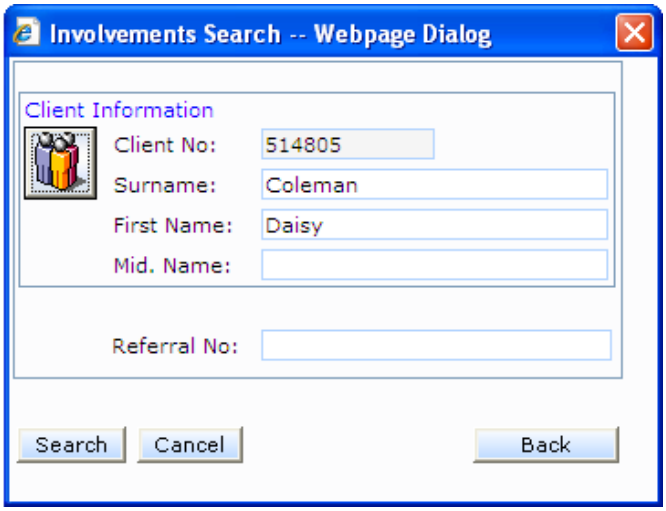
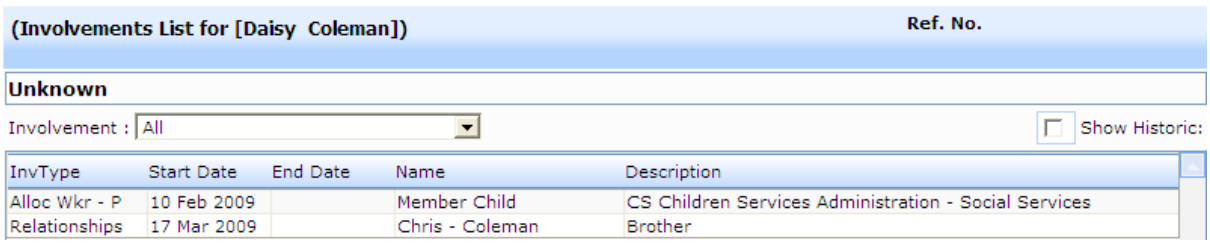


The Client No then appears in the Involvement search screen, clicking on the Search button will return all the current Involvement to the client.





The result brings back all open involvements. Should you wish to see a history select the Show Historic: checkbox. This will return all both open and closed involvements.

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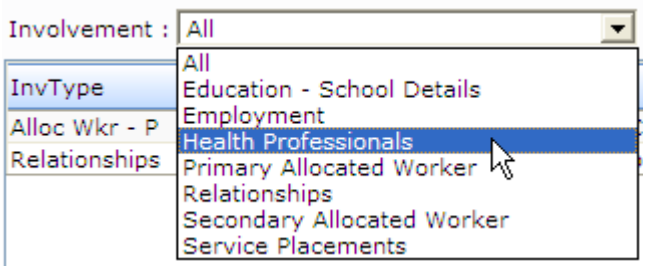
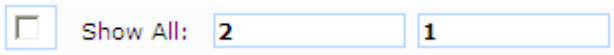
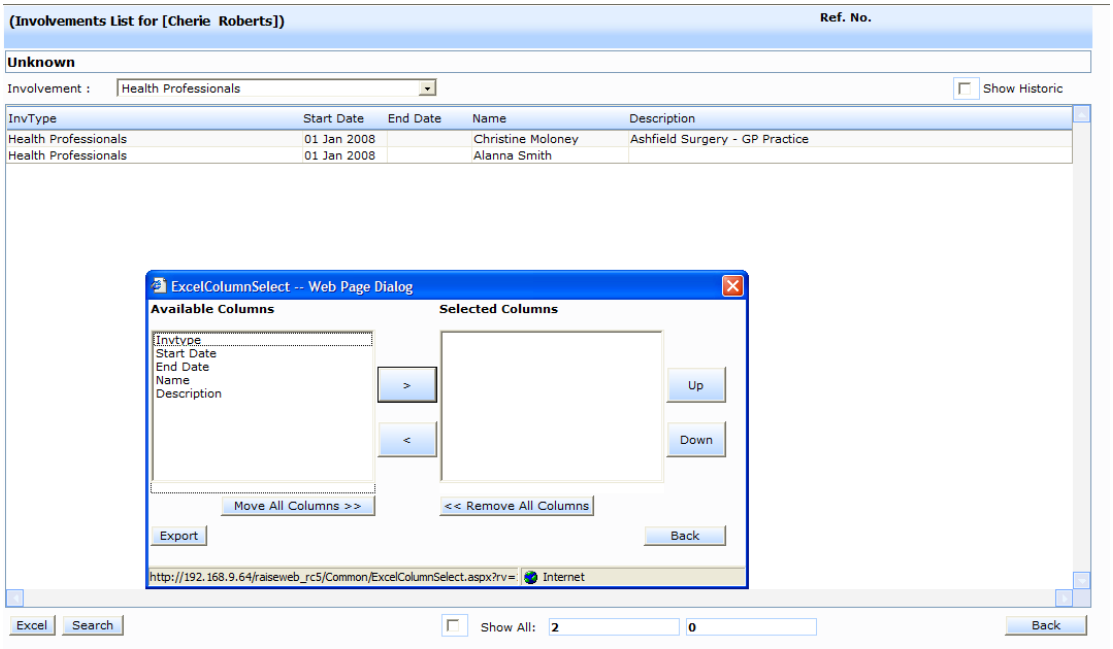
The screen can also be filtered by changing the Involvements drop-down list.



Depending on the permission a user has to view a client's Involvements these are counted and the number will be displayed in the hide count on the bottom of the screen. The screen below shows there are 2 results displayed, and 1 hidden involvement.



The involvement screen has the ability to export the information onto an Excel spread sheet by clicking on the Excel button. This presents the user with the ability to choose the structure of the report by either selecting the available columns individually or by clicking on the Move All Columns >> and then clicking the Export button.



The user is then presented with an Excel spread sheet:

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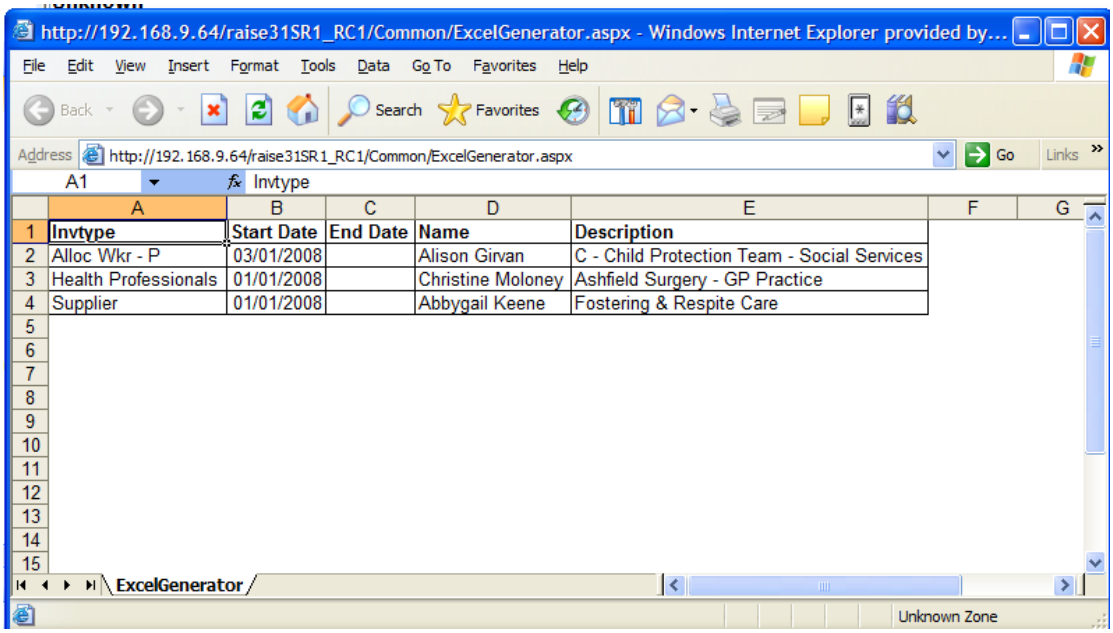

	A	B	C	D	E	F	G
1	**Invtype**	**Start Date**	**End Date**	**Name**	**Description**		
2	Alloc Wkr - P	03/01/2008		Alison Girvan	C - Child Protection Team - Social Services		
3	Health Professionals	01/01/2008		Christine Moloney	Ashfield Surgery - GP Practice		
4	Supplier	01/01/2008		Abbygail Keene	Fostering & Respite Care		
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

Summary

You should now be familiar with

- Searching for a Client
- Updating Client Details
- Entering a New Client
- Recording Personal Details
- Lead Professional
- Adding Relationships
- Viewing people Involved with a Client

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Chapter 3) Updating Personal Details

Description

- This session describes how to update Personal Details using the various tabs and buttons throughout the Personal Details module.

Objectives

At the end of this session delegates will be familiar with:

- Updating Religion, Phone Number and other Personal Details of a client.
- Recording Health Details including details of a client's GP, Disability Details and Hospital Admissions.
- Recording Education Details of a client including Schools, Examination Results and Special Needs Education.
- Using the tabs in the Personal Details module to record, update or view details about a client such as Employment, Legal Status, Significant Events, Letters, Audit Trail and Merge Information.
- Using the buttons on the Personal Details screen to record, update and view details about a client such as Category, Role, Name History and Alias, Language and Other Information and Consent.
- Transferring client records from one organisation to another.

Updating Client Details

As shown in Session 2, a client can be selected by searching for them (by clicking the Search button) on the Personal Details screen. Searches will return only Clients you are authorised to view.

Alternatively, the button can be used to return from other modules, such as Referrals, Assessments etc., to the Personal Details screen for a client. Similarly, when a client is selected in any CareDirector Youth module, selecting the Personal Details module from the left-hand window, will display the personal details of that client.

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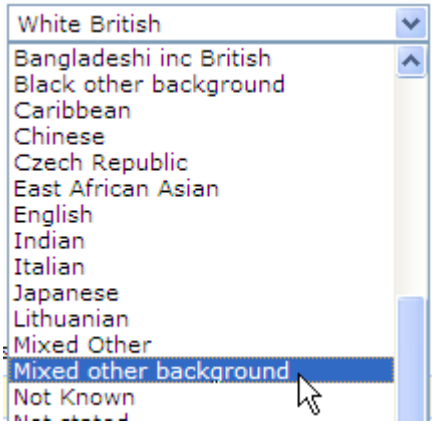
Once the Personal Details screen for a client has been selected and are displayed on the screen these details can be updated or additional details can be added.

Reminder: A banner on each screen displays the name of the current client.

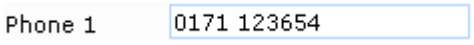
Reminder: If a Workflow has been configured for any screen in the Personal Details module, the mandatory fields may differ from those shown here.

To Add or Update the Religion field



- Select the personal details of the client.
- Choose a Religion from the list.
- Click on Update to save any changes.

To Add or Update the Phone Number



- Select the personal details of the client.
- Type the information in the Phone field.
- Click on Update to save any changes.

See Also: Session 2 for updating Address, Marital Status and Relationships.

Recording **Health Details**

The Health tab in the Personal Details module is made up of five screens on which details of health can be recorded.

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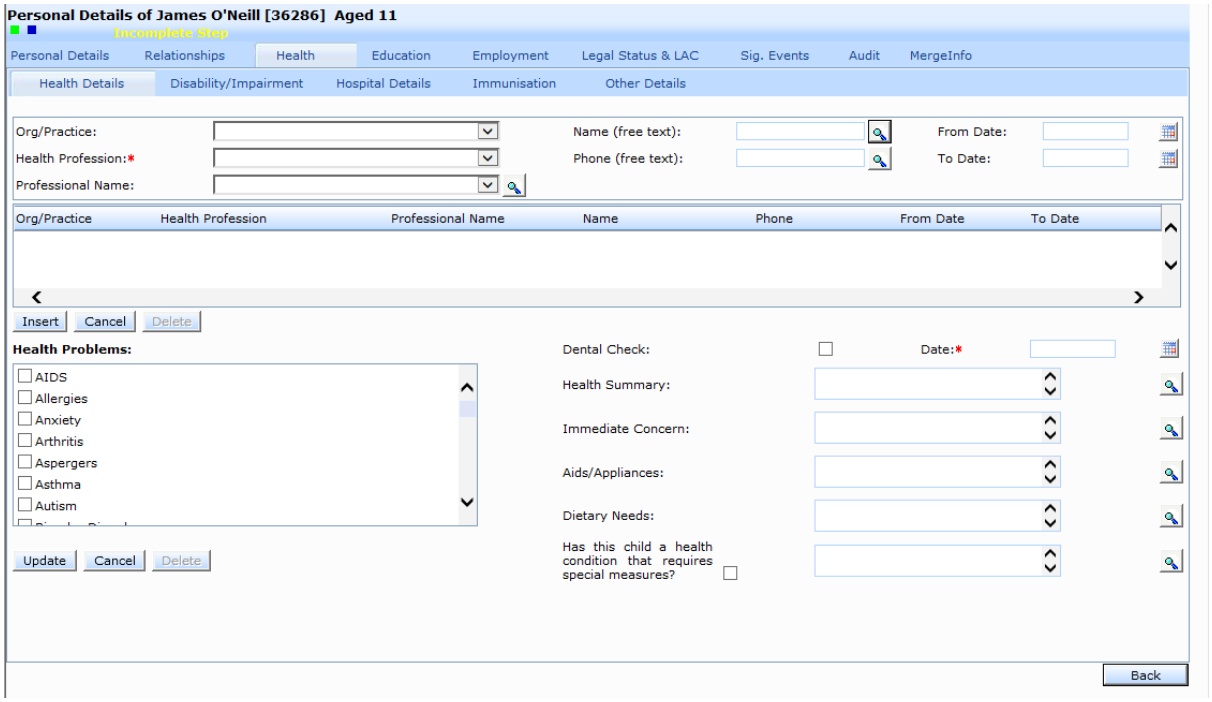

- The **Health Details** screen is used to record the name of the GP, Community Health Worker or other Health professionals associated with the client. It also allows the user to record a list of known health problems and a number of free text comments about the client's health.
- Details of any **Impairment** or **Disability** along with the severity are recorded in the second screen.
- The **Hospital Details** screen is used to record any admissions to hospital.
- The types of **Immunisation** given and the age of the child when immunised are recorded on the fourth screen.
- The final screen is used to record **Other Details** including childhood illnesses, allergies and other health related information.

In this session we look at three examples:

- ❖ Recording a Hospital Admission.
- ❖ Entering the name of a client's GP.
- ❖ Entering details of a Disability.

To Record a Hospital Admission

☞ Select the Personal Details of the client.

☞ Click on the Health tab in Personal Details and click on the **Hospital Details** tab.

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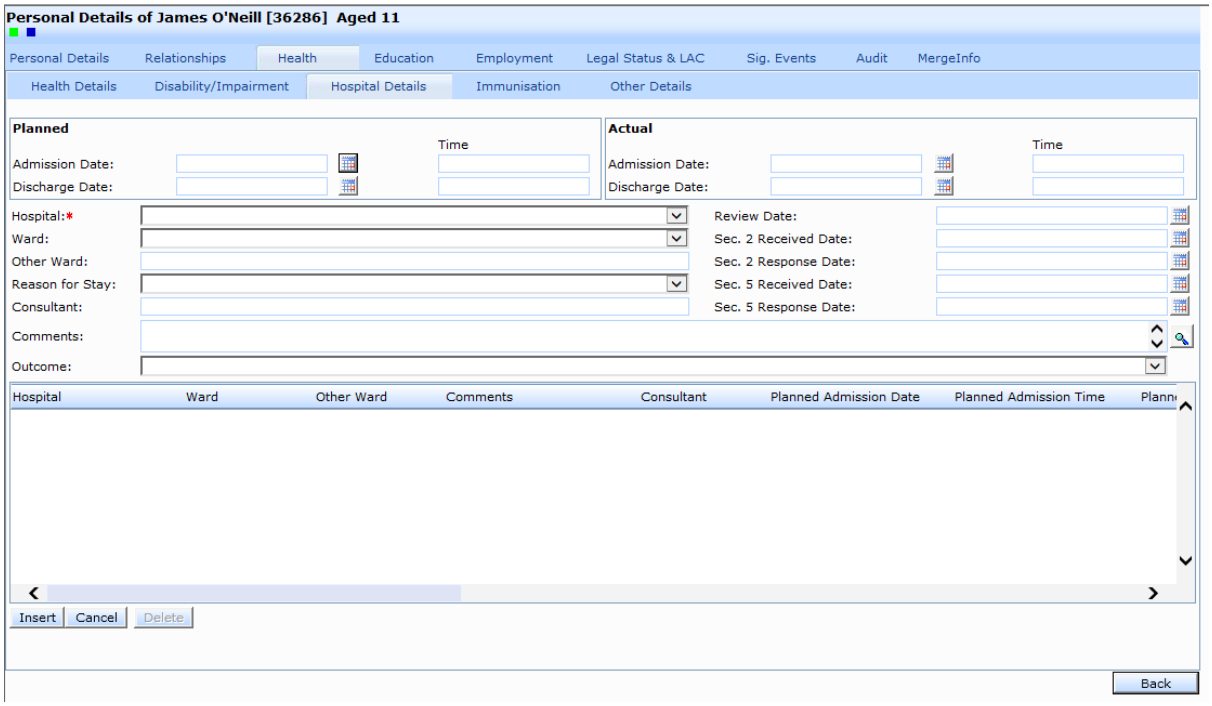
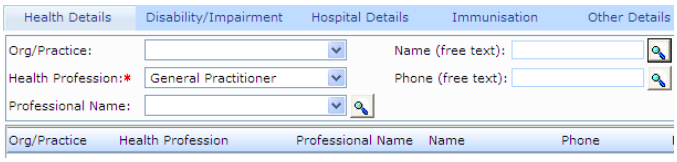


- Enter an **Admission Date**, either **Planned** or **Actual**.
- Select the name of the **Hospital** from the drop-down list.
- Optionally select the name of the **Ward** from the drop-down list or type in the name of the Ward in the Other Ward field.
- Optionally supply a **Discharge Date** as well as details about the **Reason for Stay**, Consultant and other Comments.
- Record the Dates of **Receipt** and **Response** to **Section 2** and **Section 5**, and **Outcome**, as appropriate. These dates will allow the Hospital Discharge Details to be linked to a Referral using the Discharge button on the Referral Detail screen (see Session 3 – Referrals for further details).

Note: Hospital Discharge details will normally be recorded for Adults only.

To Record the Name of the Client's Health Professionals

- Select the Personal Details of the client.
- Click on the Health tab in Personal Details and click on the Health Details tab.
- Select the Health Professional type from the drop-down list.



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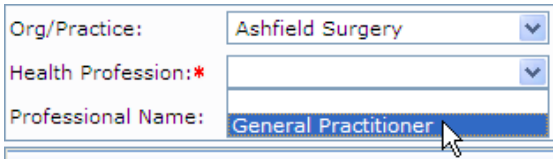
- Select the Professional's name from the drop-down list.

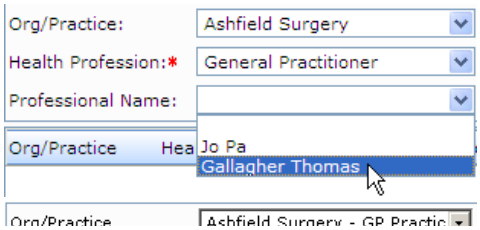
OR

- Type in the Professional's Name (and phone no. if available) into the Free Text fields.
- Press Insert to create the record.

GPs can be grouped into Medical Practices. If this option is being used at your site, the Practice can be selected from the Org/Practice drop down list.

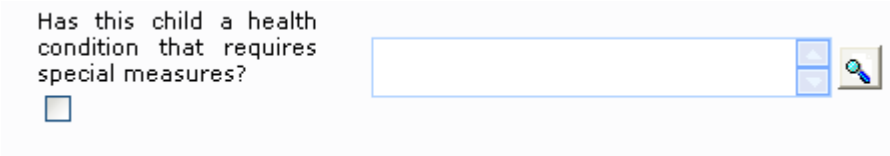
The Health Professional List will show General Practitioner only.
The Professional Name drop-down list will only show the GPs associated with that specific practice.



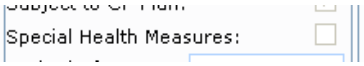


To Record that a child has a health condition that requires special measures

This text box allows the addition of information relating to a health condition for a child and acts then as an alert on the main Person Details screen.

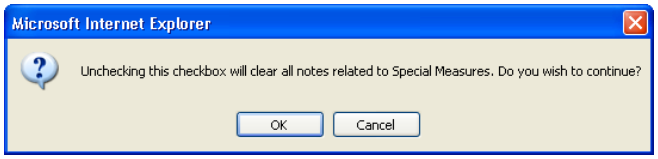


When information is entered the associated tick box on the same screen is auto completed. On the main person details screen the "Special Health Measures" tick box is also completed



when text is saved within this field and acts as an alert to the system user.

Note: To remove the information from the tick box it is possible to firstly remove the tick in the tick box within the Health screen. A message will be displayed asking for confirmation before the information is removed.


Microsoft Internet Explorer
Unchecking this checkbox will clear all notes related to Special Measures. Do you wish to continue?
OK
Cancel

Note: Further information about each of the Health Professionals in the drop down list is available by selecting the name and clicking on the **Zoom** button.

This displays any address and contact information recorded on CareDirector Youth about the Professional.

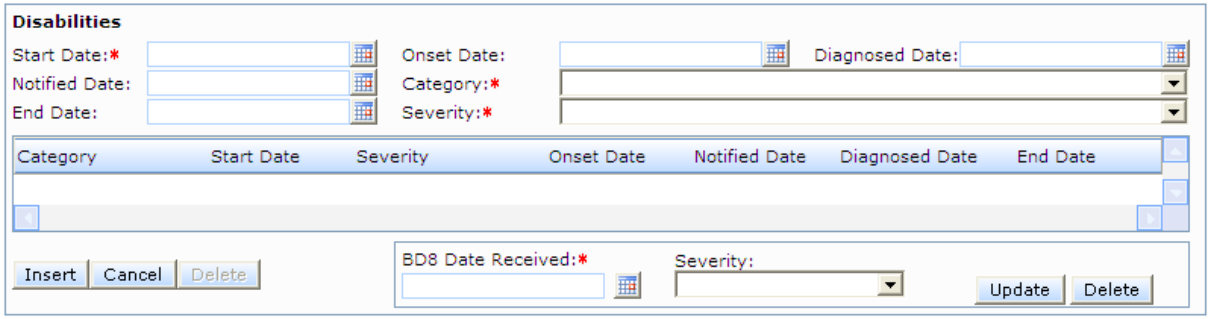
This also displays details of other clients registered with that person..

To Record a Disability

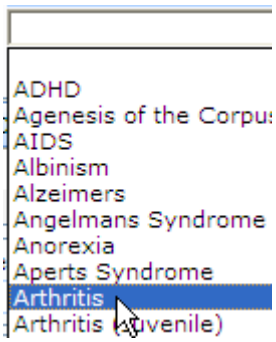
The **Disability/Impairment** screen may be used to record details of any disability and the severity of that disability.

Where applicable, the following should be recorded on this screen: Registered Blind, Registered Deaf, Registered Hard of Hearing or Registered Partially Sighted.

- Select the Personal Details of the client.
- Click on the **Health** tab in Personal Details and click on the **Disability/Impairments** tab.



- Select a Disability **Category** from the drop-down list.
- Select a **Severity** from the drop-down list.
- Enter a **Start Date**.
- Enter the date the **BD8** was **Received**.
- Click on Insert to add the information.



Note: Follow the same process to fill in details of any impairment on this screen.

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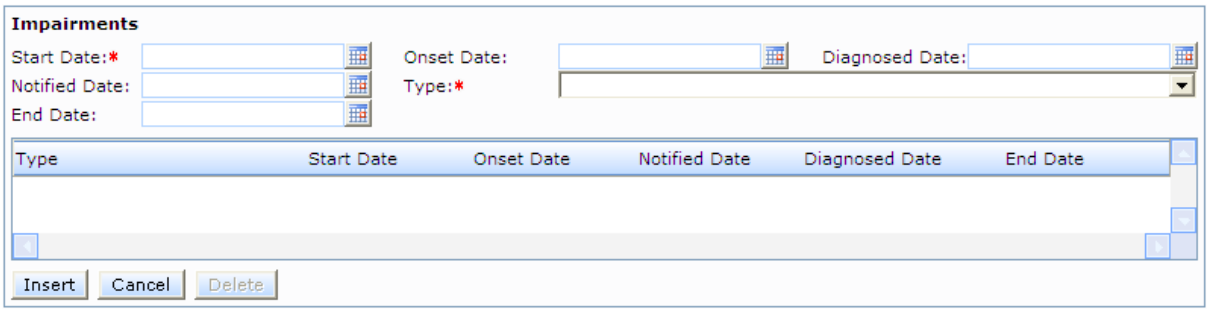

Note: Dates Recorded for Disabilities and Impairments

There are five dates that can be recorded for each record. These should be used as follows:

Start Date Date information was added to CareDirector Youth.
Start Date is a mandatory field.

Onset Date Actual or estimated date when condition first began or was believed to have an impact on the client.

Diagnosed Date Date that a diagnosis was made by an appropriate specialist.

Notified Date Date that Social Services were informed.

End Date Date when the condition ceased.

Recording Education Details

The Education tab has two screens:

- The **School** screen is used to record details of the schools attended.
- The **Education** screen is used to record absences, exclusions, examinations, special needs education, standard assessment tests and other education details.

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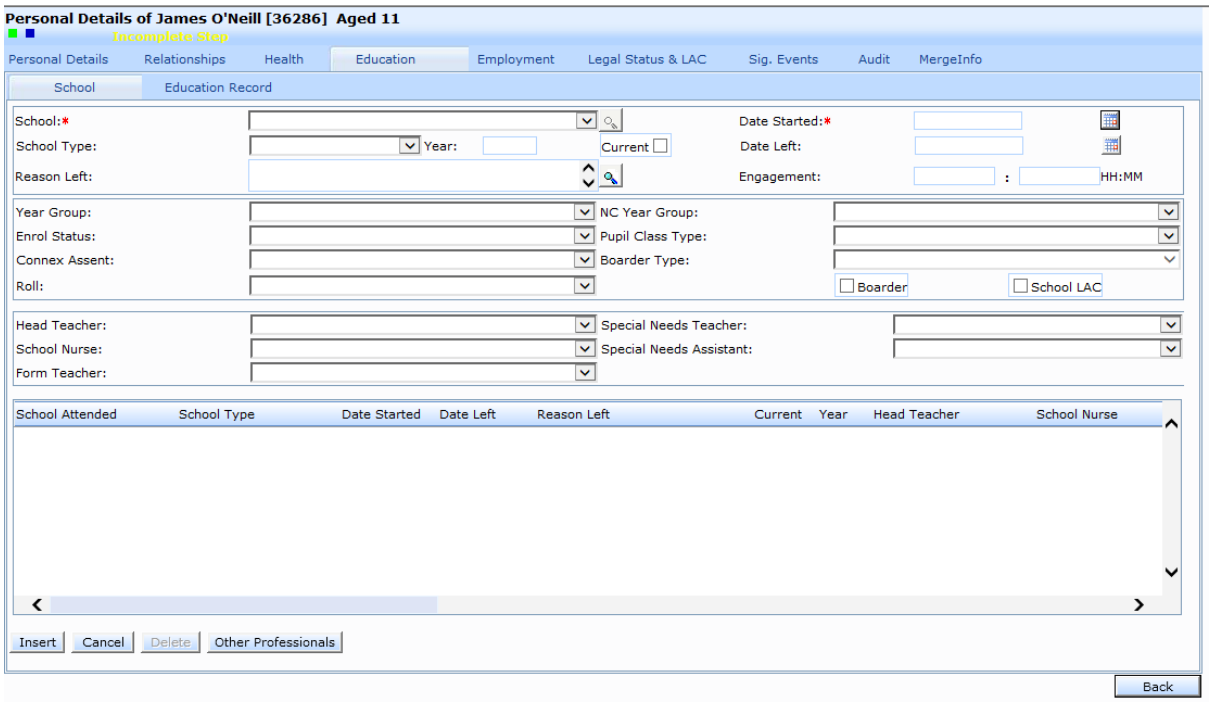
School Details



- Select the **School** from the drop-down list.
- Enter the **Start Date** for the client at the selected school.

This is the minimum amount of information required by the system. Additional details such as year, teacher(s) name etc. can be entered now by filling in the remaining fields.

Note: Year Group refers to the year group the child is in according to their age. **NC Year Group** refers to the year in which they are actually taught.

Example:

A child held back 1 year, and 11 years old at 1st Sep, would be in **Year Group** (according to age) – Year 7, and **NC Year Group** (actually taught in) – Year 6.

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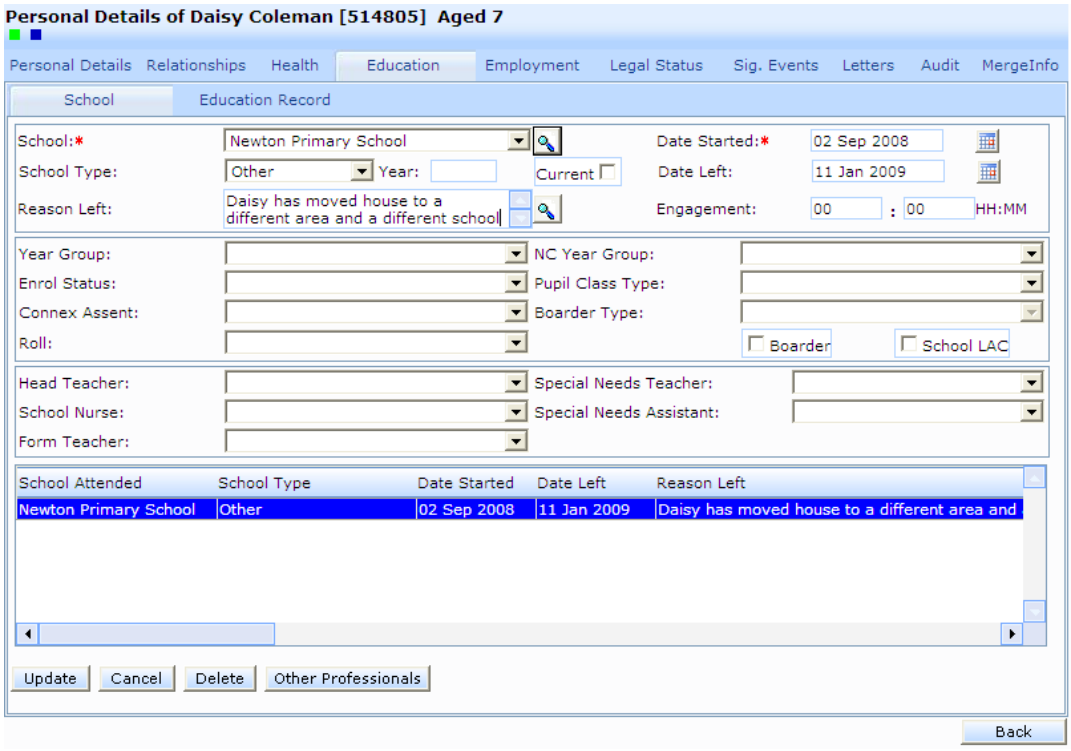

The new school details are then entered as a new record, on the same screen.

Education

The **Education Record** tab is divided into five separate screens. Each of the screens may be completed in exactly the same way as the other screens in the Personal Details module.

- The first screen, **Absence/Exclusion** is used to record periods of non-attendance at school. The Indicator and Reason are selected from the drop-down lists. The dates of the absence are selected from the calendar.
- The second screen is used to record **Examination** details. Again, the fields are selected from drop-down lists and by filling in the date(s).
- The **Special Needs** screen includes a drop-down list of stages in Special Needs Education. (See example below).
- The **Standard Assessment Test** screen includes drop-down lists for Exam Type, Level, Subject, Date and Did Not Sit Code.
- The **Other Details** screen includes drop-down options to record the presence of Individual Education Plan, Subject of Statement of Special Needs and Transition Plan Made. The screen also includes free text fields for Other Courses / Training Undertaken, Achievements in Sports and Drama and who holds Record of Achievement.

Reminder: Click on Insert or Update to save the changes to the client's details.

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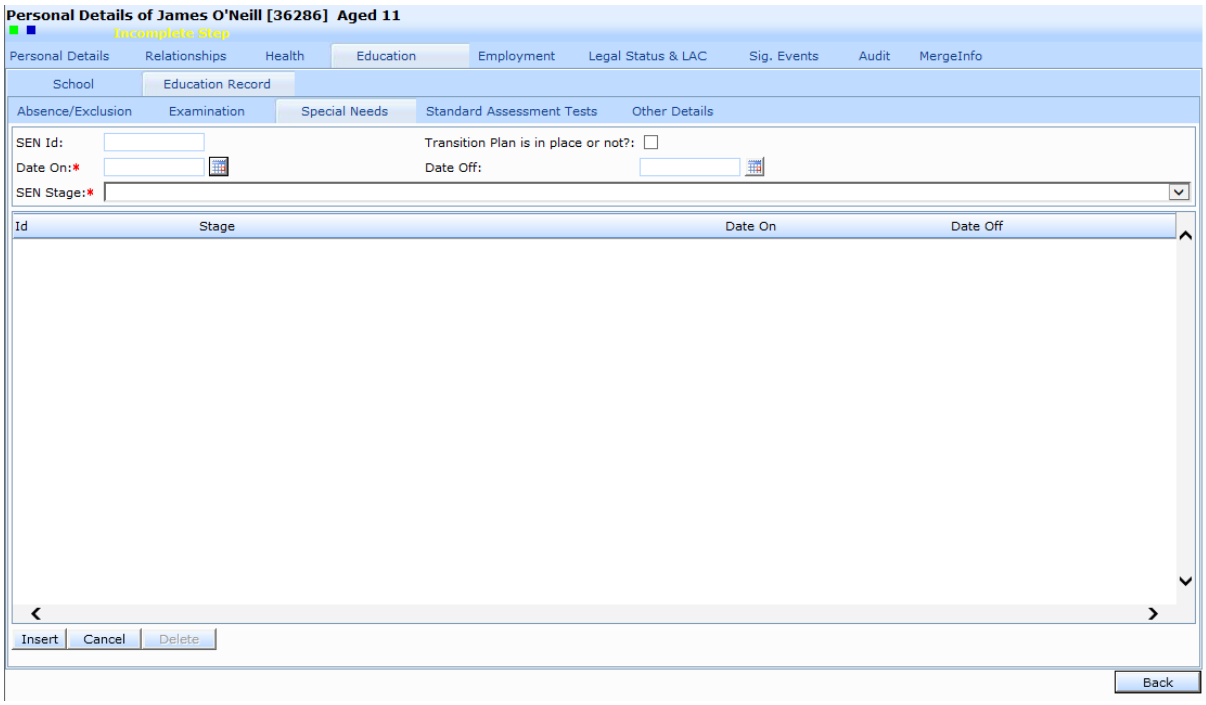
For example, to add details of **Special Needs Education:**

- Select the Personal Details of the client.
- Click on the **Education** tab in Personal Details.
- Click on the **Special Needs** Education tab. The following screen appears:



- Fill in the **Date On**.
- Select the **SEN Stage** from the drop-down list.
- Click on Insert to update the client's details
- The ID is automatically allocated by the system.

Reminder: Dates can be entered by typing in the date or by selecting the month and year from the drop-down lists in the calendar and the clicking on the date.

Other Tabs in the Personal Details Module

There are other tabs available from the Personal Details screen:

- Employment
- Legal Status
- Sig. Events
- Letters
- Audit Trail

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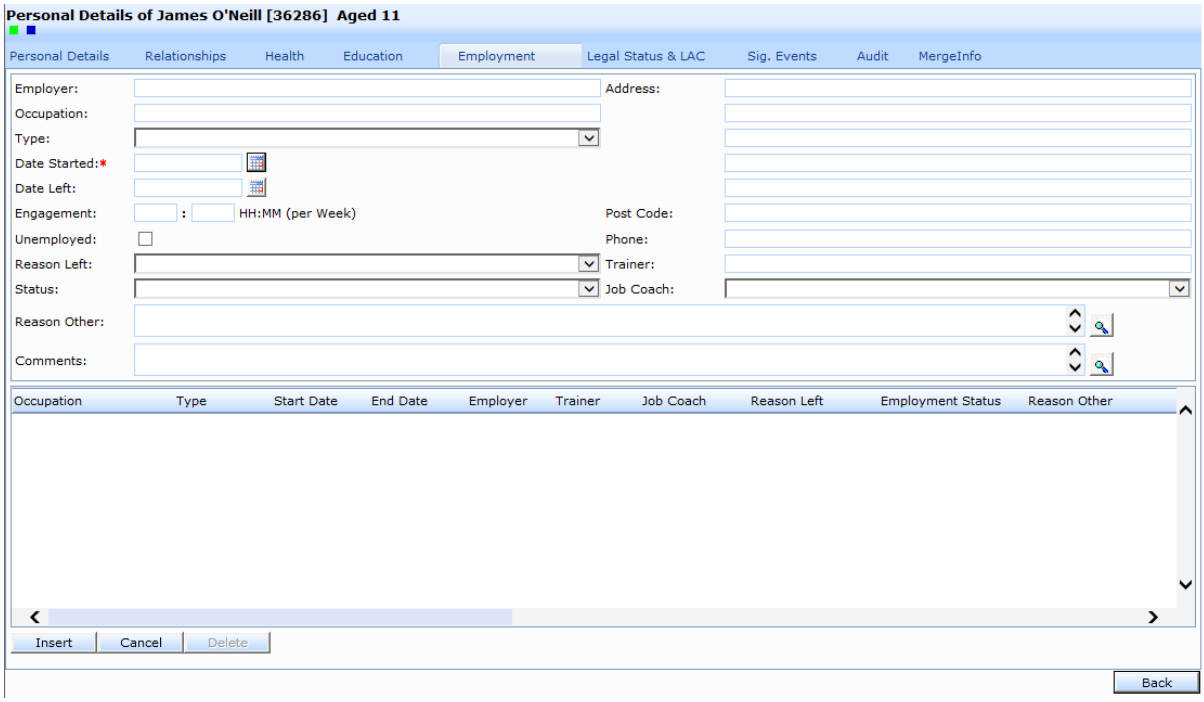
- Merge Info

Reminder: The actual tabs shown, as well as the fields on those pages, depend on the module profile associated with the user's logon.

Employment

The **Employment** screen is used to record details of jobs held by the client including apprenticeships, voluntary work and part-time work.



- Enter the **Employer**'s Name.
- Type in the **Occupation**.
- Select the **Type** of Employment or Training Scheme from the drop-down list.
- Enter a Date Started.
- Enter the **Engagement** hours (and minutes) per week.
- Add any other details.
- Click on Insert to update the client's details.

The details of the employment can be updated at a later stage by selecting the record, adding new or changed details and clicking on Update. For example, **Date Left** and **Reason Left** can be recorded at a later stage.

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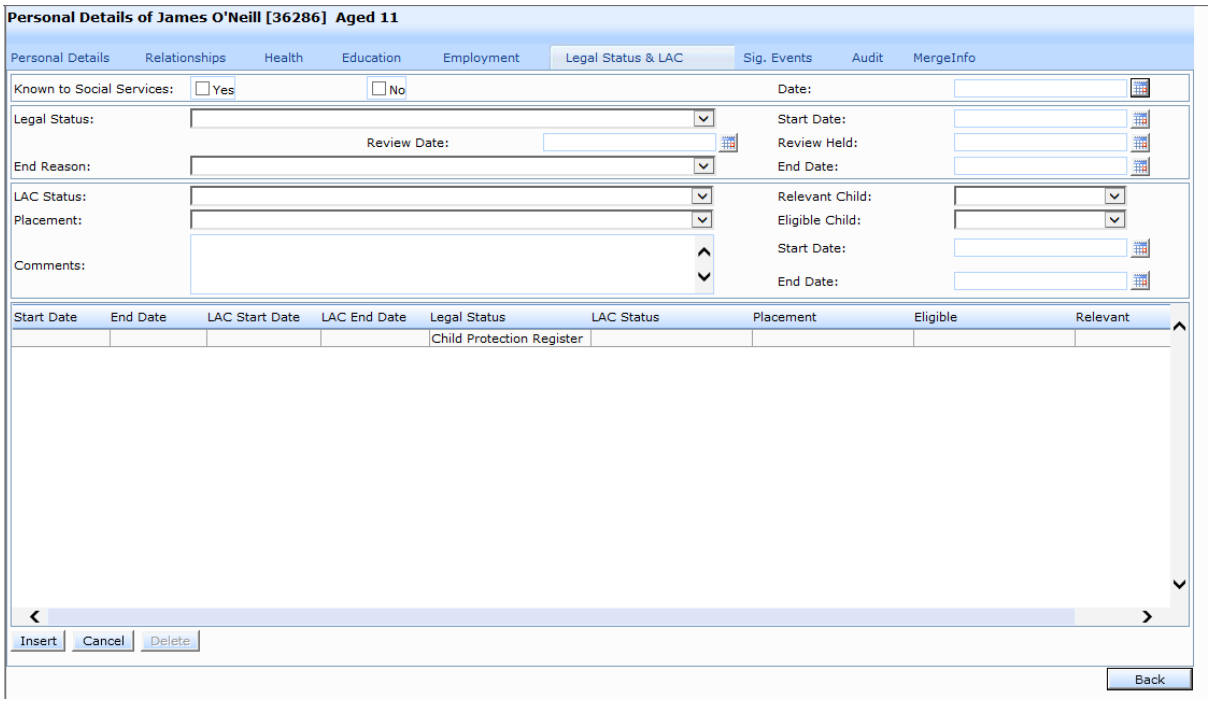
Legal Status & LAC



To Record a Legal or LAC Status for a Client

- Select the Personal Details of the client.
- Click on the *Legal Status & LAC* tab.

Complete the form using the fields described in the table below:

Name	Description
Known to Social Services	Select a check box to record if the client is *Known to Social Services* or not.
Date	The most recent date that *Known to Social Services* status was recorded
Legal Status	Select the client's current *Legal Status* from a statutory list .
Start Date (Legal Status)	The start date of the client's current legal status
Review Date	The 'due by' date of the client's legal status review.
Review Held	The date the cleint's review date was actually held.
End Reason	The recorded reason for the client's legal status ending or changing.
End Date (Legal Status)	The date the cleint's current legal status ends or changes.
LAC Status	The Looked After Child status.

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Placement	The client's placement type.
Relevant Child	Select if the child is relevant (or whether this is unknown)
Eligible Child	Select if the child is eligible (or whether this is unknown)
Start Date (LAC)	The start date of the client's LAC status.
End Date (LAC)	The end or change date of the client's LAC status.
Comments	Any notes or comments about the LAC episode or placement.

❖ Click on

to add the Legal Status.

Recording Significant Events

Where a client has a long association with Social Services, recording a separate list of **Significant Events** may be useful.

The Significant Events Screen can be used to highlight to a practitioner the milestones of the contacts.

Significant events are recorded for a client in the Personal Details module.

Significant events include:

- Court Proceeding (e.g. Emergency Protection Order, Section 7 Report etc.)
- Family (e.g. Parents separate, Step-parent, Death in family, Drug abuse etc.)
- Personal (e.g. Notified as missing, Domestic Abuse, Drug Abuse etc.)

To Add a Significant Event:

☞ Select the Personal Details of the client.

Click on the **Sig. Events** tab.

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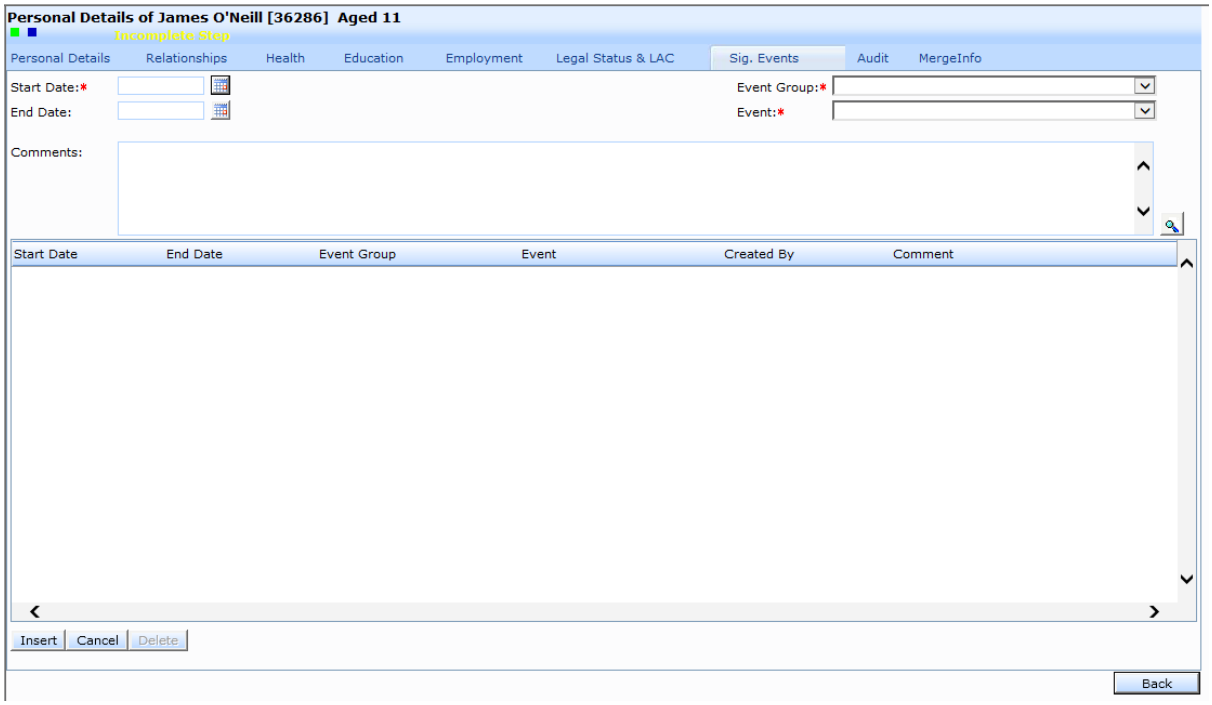
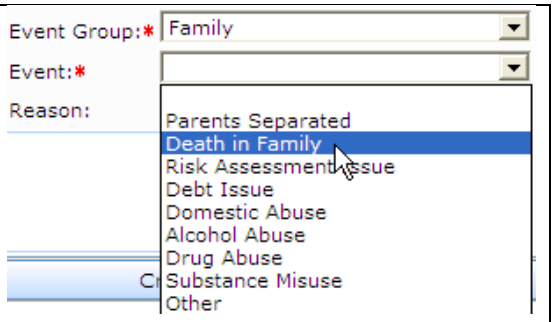


- Enter a Start Date for the event.
- Select an Event Group and an event from the drop-down lists.
- Additional information such as a Reason or a Comment can also be recorded on this screen.

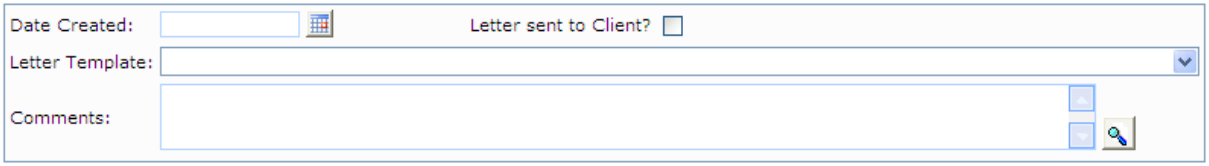


Letters

The CareDirector Youth system can create and print standard letters. A local system administrator is responsible for adding in the letter templates to be used at your location.

To Create a Letter

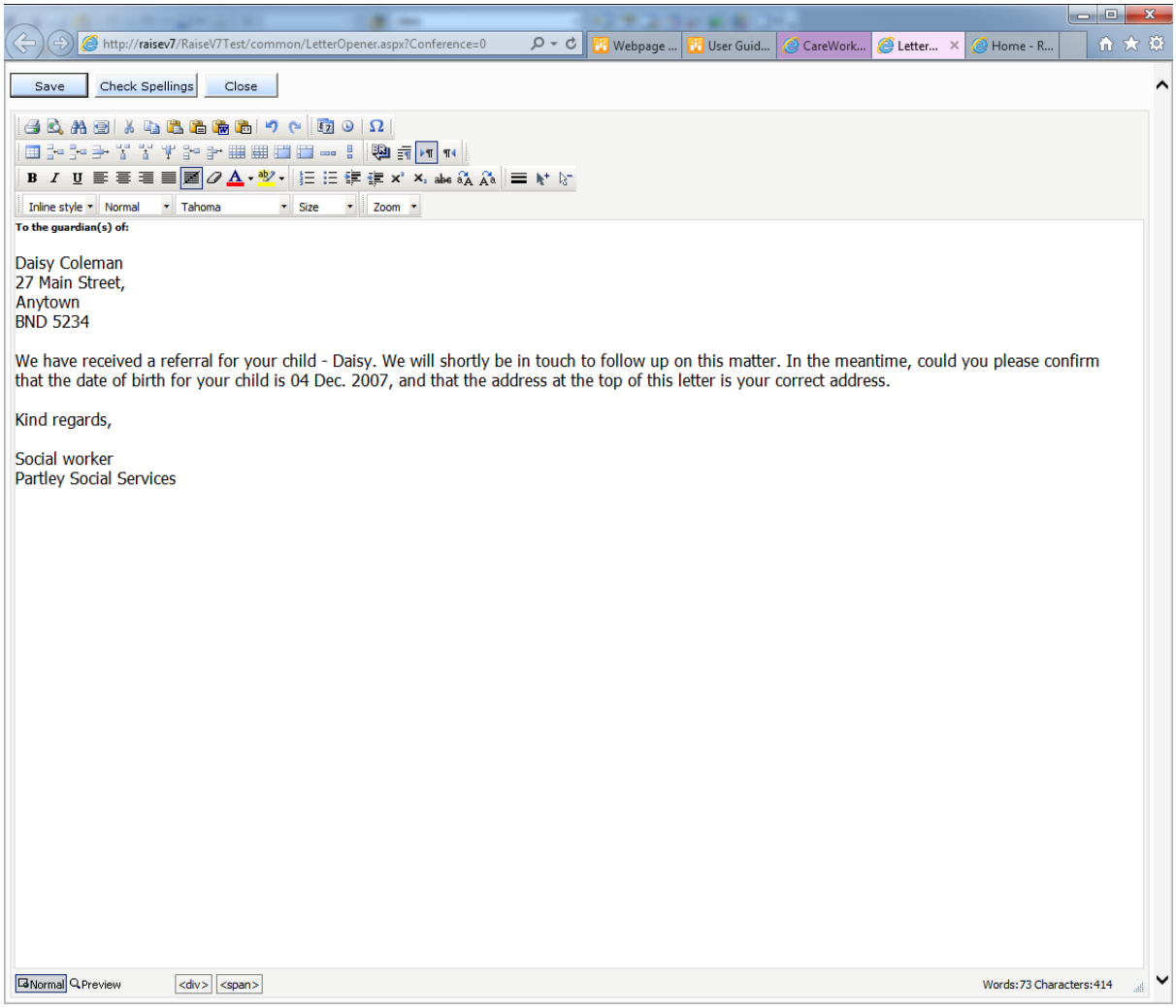
4. Select the client and choose the Letters tab from the Personal Details module.



- Fill in the **Date Created**.
- Choose a **Letter Template** from the drop-down list.

- Fill in any **Comments** about the letter and Click Insert.

A letter appears on the screen based on the template selected. The client's details such as name and address are automatically filled in by the system.



- The letter can be printed out for sending by clicking on the **Print** button in the letter.
- Click on **Save** to save a copy of the letter.
- Click on **Close** to return to CareDirector Youth.

To Reprint a Letter

- Select the client and choose the Letters tab from the Personal Details module.
- Select the letter and double-click to open the letter.
- As outlined above click on **Print** to print another copy of the letter.

As mentioned in Session 1, the system keeps track of each time information about a client is viewed or updated. These details can be viewed by selecting the **Audit** tab.

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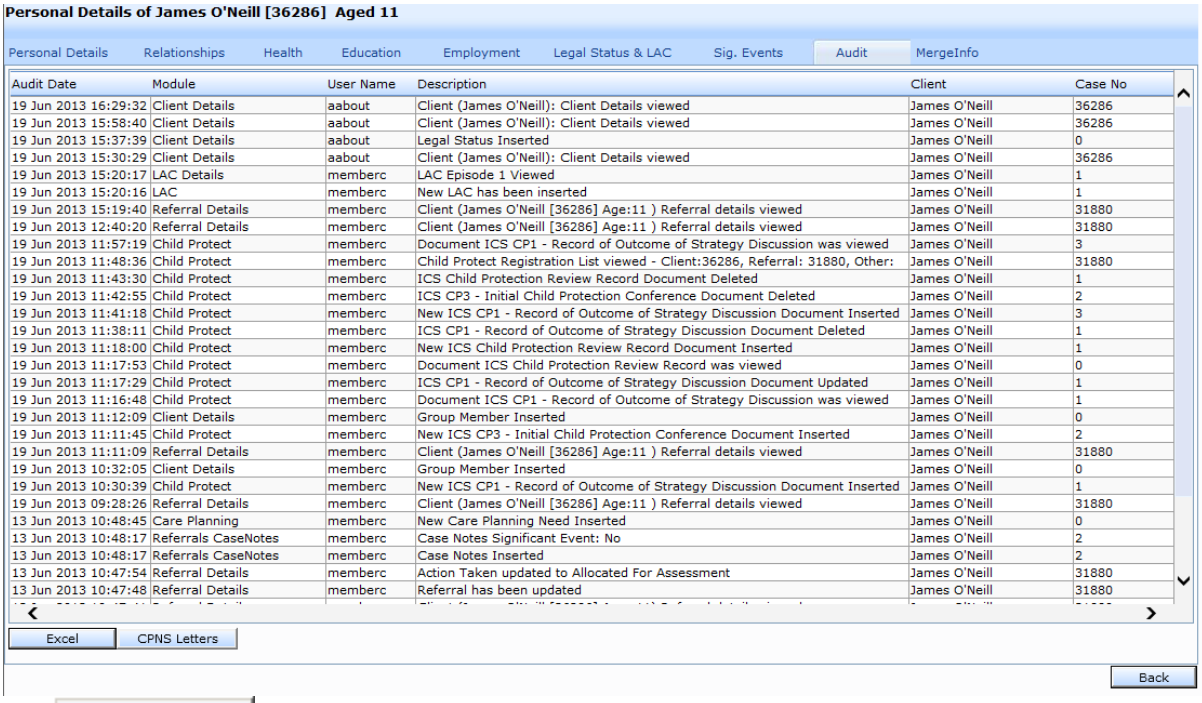


Audit Date	Module	User Name	Description	Client	Case No
19 Jun 2013 16:29:32	Client Details	aabout	Client (James O'Neill): Client Details viewed	James O'Neill	36286
19 Jun 2013 15:58:40	Client Details	aabout	Client (James O'Neill): Client Details viewed	James O'Neill	36286
19 Jun 2013 15:37:39	Client Details	aabout	Legal Status Inserted	James O'Neill	0
19 Jun 2013 15:30:29	Client Details	aabout	Client (James O'Neill): Client Details viewed	James O'Neill	36286
19 Jun 2013 15:20:17	LAC Details	memberc	LAC Episode 1 Viewed	James O'Neill	1
19 Jun 2013 15:20:16	LAC	memberc	New LAC has been inserted	James O'Neill	1
19 Jun 2013 15:19:40	Referral Details	memberc	Client (James O'Neill [36286] Age:11) Referral details viewed	James O'Neill	31880
19 Jun 2013 12:40:20	Referral Details	memberc	Client (James O'Neill [36286] Age:11) Referral details viewed	James O'Neill	31880
19 Jun 2013 11:57:19	Child Protect	memberc	Document ICS CP1 - Record of Outcome of Strategy Discussion was viewed	James O'Neill	3
19 Jun 2013 11:48:36	Child Protect	memberc	Child Protect Registration List viewed - Client:36286, Referral: 31880, Other:	James O'Neill	31880
19 Jun 2013 11:43:30	Child Protect	memberc	ICS Child Protection Review Record Document Deleted	James O'Neill	1
19 Jun 2013 11:42:55	Child Protect	memberc	ICS CP3 - Initial Child Protection Conference Document Deleted	James O'Neill	2
19 Jun 2013 11:41:18	Child Protect	memberc	New ICS CP1 - Record of Outcome of Strategy Discussion Document Inserted	James O'Neill	3
19 Jun 2013 11:38:11	Child Protect	memberc	ICS CP1 - Record of Outcome of Strategy Discussion Document Deleted	James O'Neill	1
19 Jun 2013 11:18:00	Child Protect	memberc	New ICS Child Protection Review Record Document Inserted	James O'Neill	1
19 Jun 2013 11:17:53	Child Protect	memberc	Document ICS Child Protection Review Record was viewed	James O'Neill	0
19 Jun 2013 11:17:29	Child Protect	memberc	ICS CP1 - Record of Outcome of Strategy Discussion Document Updated	James O'Neill	1
19 Jun 2013 11:16:48	Child Protect	memberc	Document ICS CP1 - Record of Outcome of Strategy Discussion was viewed	James O'Neill	1
19 Jun 2013 11:12:09	Client Details	memberc	Group Member Inserted	James O'Neill	0
19 Jun 2013 11:11:45	Child Protect	memberc	New ICS CP3 - Initial Child Protection Conference Document Inserted	James O'Neill	2
19 Jun 2013 11:11:09	Referral Details	memberc	Client (James O'Neill [36286] Age:11) Referral details viewed	James O'Neill	31880
19 Jun 2013 10:32:05	Client Details	memberc	Group Member Inserted	James O'Neill	0
19 Jun 2013 10:30:39	Child Protect	memberc	New ICS CP1 - Record of Outcome of Strategy Discussion Document Inserted	James O'Neill	1
19 Jun 2013 09:28:26	Referral Details	memberc	Client (James O'Neill [36286] Age:11) Referral details viewed	James O'Neill	31880
13 Jun 2013 10:48:45	Care Planning	memberc	New Care Planning Need Inserted	James O'Neill	0
13 Jun 2013 10:48:17	Referrals CaseNotes	memberc	Case Notes Significant Event: No	James O'Neill	2
13 Jun 2013 10:48:17	Referrals CaseNotes	memberc	Case Notes Inserted	James O'Neill	2
13 Jun 2013 10:47:54	Referral Details	memberc	Action Taken updated to Allocated For Assessment	James O'Neill	31880
13 Jun 2013 10:47:48	Referral Details	memberc	Referral has been updated	James O'Neill	31880

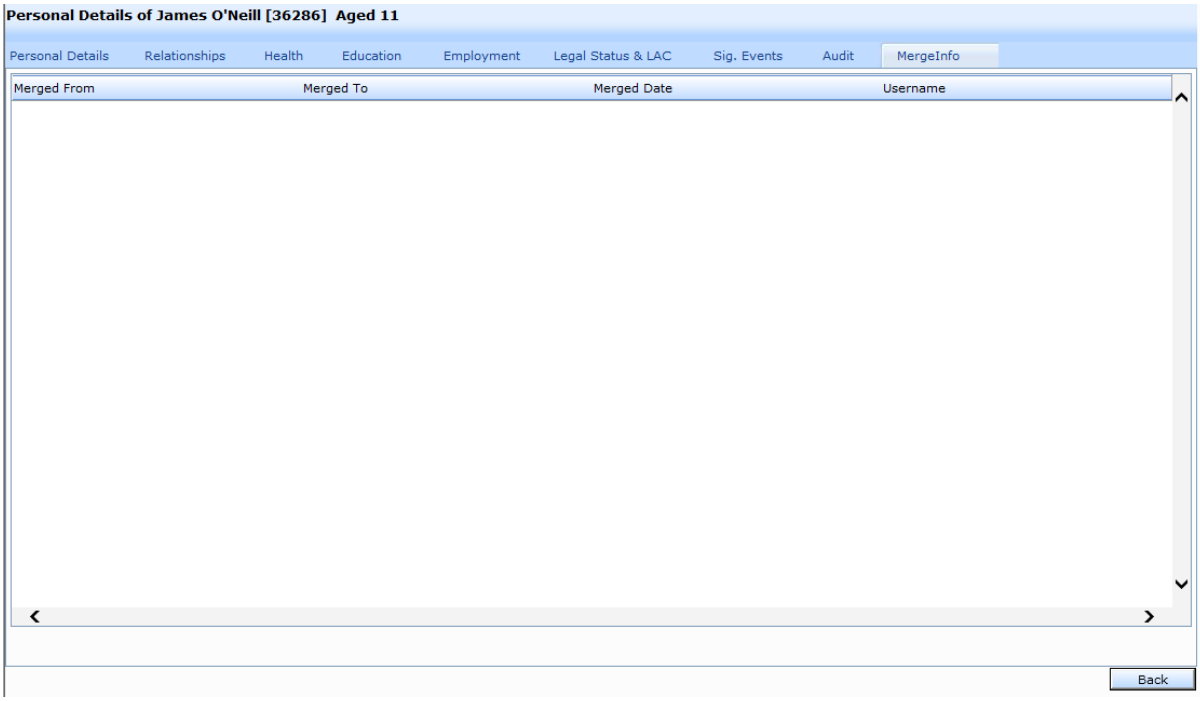
The Excel button allows the list to be exported to an Excel spread sheet, for printing or analysis.

Merge Info

If there are two records within CareDirector Youth for the same client, and information has been added to both records (so one of them cannot be deleted), it is possible to 'merge' one record into the other, resulting in just one record for the client.

This may occur for example, where a client has been entered onto the system twice in error, or where two clients have been added to the system and it becomes known at a later date that one of the names was an alias for the same person and not in fact two separate people as first appeared.

The Merge facility itself is within the System Administration module, but the Merge Info screen within Personal Details indicates whether there has been a 'merge' performed on the client's record, and provides information about the merge(s).



In this example, there used to be two records within CareDirector Youth for Daisy Coleman; a record with Client Number 514069 (Merged From) and a second record with Client Number 513693 (Merged To):

Merged From	Merged To
514069	513693

The record that had the 'Merged From' Client Number no longer exists, as the information from that record has been merged into the 'Merged To' record. The current record, which has kept the 'Merged To' Client Number, is now the sole existing record within CareDirector Youth for Daisy Coleman.

The Merge Info screen also displays the date that the records were merged, and the user who performed the merge, as below.

Merged Date	Username
29 Jan 2008	careadmin

Other Buttons in Personal Details

The Client Category

In order to generate statistical reports, a client category may be recorded for a client.

To Insert a Client Category:

- Fill in the **Primary Category** and enter a **Start Date**.

- If Secondary categories exist for a Category, select the appropriate Secondary Category.
- Click Insert to save the details.

Client Role

As mentioned in Session 1, the CareDirector Youth application holds information about many types of people e.g. Service Providers, Staff Members, Referrers, as well as Service Users.

Clicking on the Client Role button on the Personal Details screen allows a client role to be entered. Role

- Select the Personal Details of the client and click on **Client Role**.
- Select a **Client Role** from the drop-down list and enter a **Start Date**.
- Click on Insert to save the details.

Note: If a client is recorded as a victim, they cannot be recorded as any other client role.

Name History

If the Surname, First Name or Middle Name of a client is updated, in Personal Details, CareDirector Youth keeps a record of any previous names.

This Name History can be viewed by clicking on the Name button on the Personal Details screen. Name

This is a read-only screen.

- Click on Back to return to the Personal Details screen.

Note: When a client search is performed, CareDirector Youth searches previous names in the name history screen, as well as the current name in the Personal Details screen, and the alias screen.

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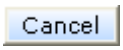
Alias

An alias can be added for a client by clicking on the Alias button on the Personal Details screen.

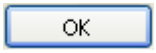
If any aliases have already been recorded for the client they are displayed here.

To add an alias

- Enter a Surname in the **Surname** field.
- A **First Name** and **Middle Name** can also be added to the Alias if required.
- Click on to add the Alias.

Note: The  button can be used to clear any text in the Surname, First Name or Middle Name fields of the Alias screen.

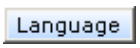
To Delete an alias

- Click on the Alias to be deleted. (Usually one entered in error).
- Click on the button. Click on  to confirm.

- Click on to return to the Personal Details screen.

Note: When searching for a client by name the system searches all previous names in name history and aliases as well as the current personal details name information.

Language

Details of languages can be recorded or updated for each client by clicking on the Language button on the Personal Details screen. 

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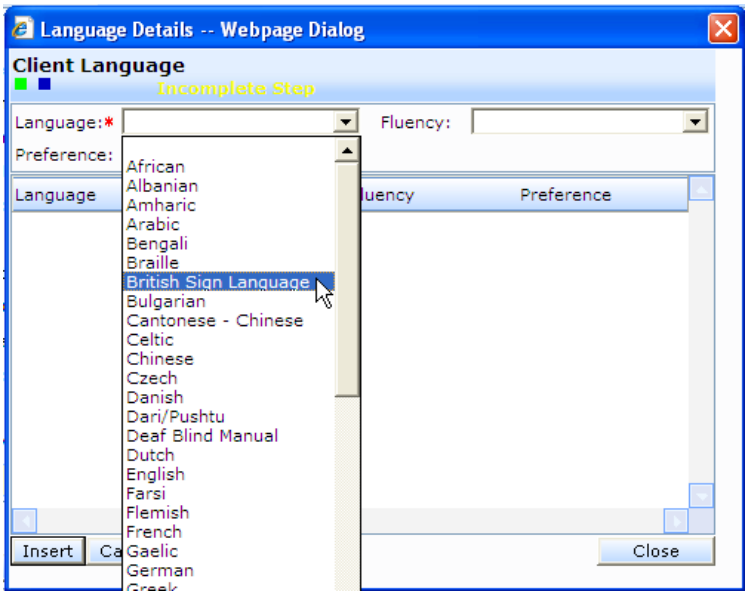

Select a **Language** from the drop-down list.

- The **Fluency** and **Preference** fields are optional in the default Workflow. Select a value from the drop-down list to fill them in, if required.
- Click on Insert to add the Language.
- To update, select the Language record in the list.
- Select the new options from the drop down lists and click Update.

Note: The Preference field is used for bilingual clients to record their preferred language.

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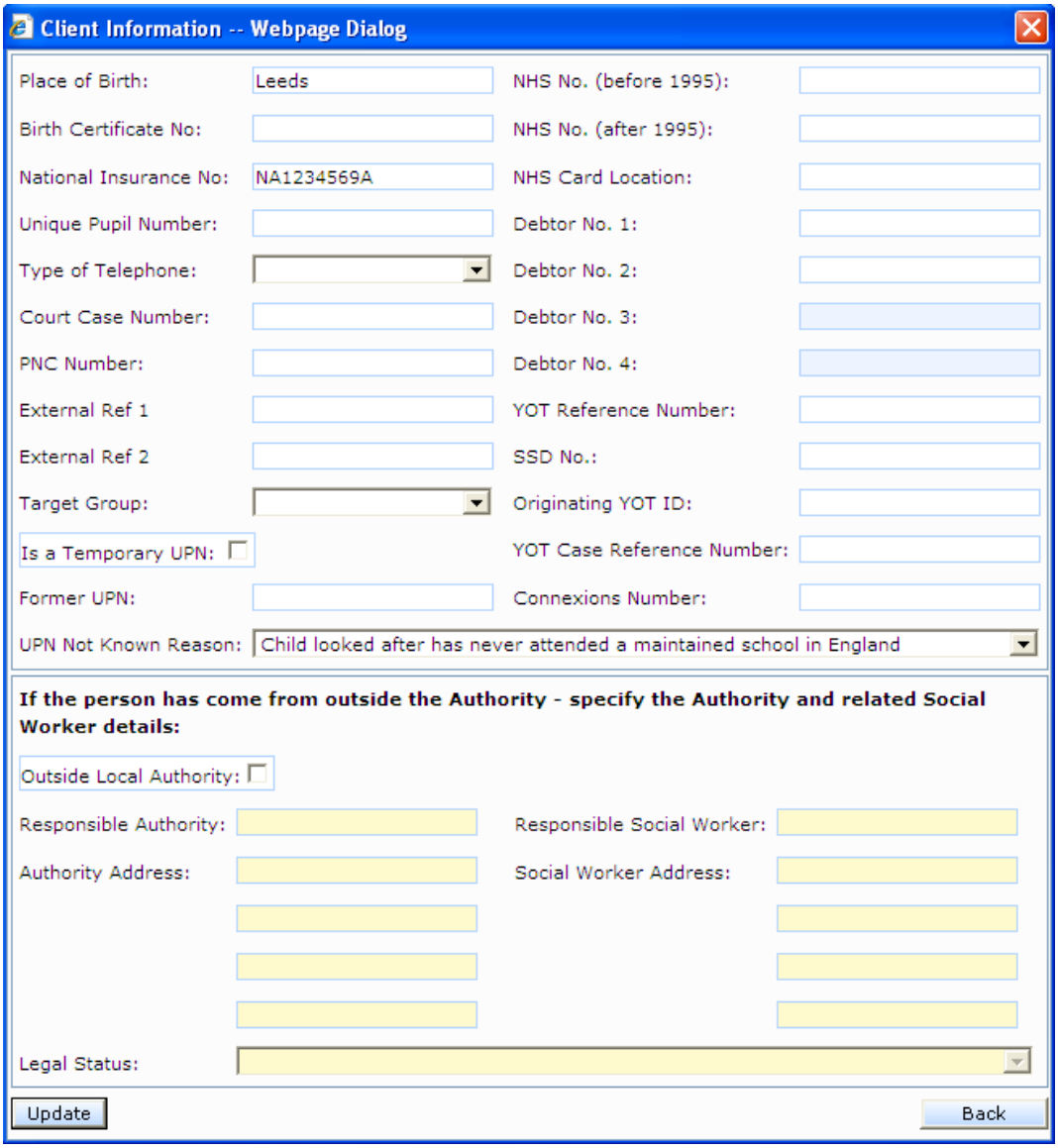
Client Other Info

The Other screen is used to capture other information about the client including Birth Cert Number, National Insurance Number, NHS Number and PNC Number.

This screen can also be used where a client has come from another local authority to record details of the other authority and the client's previous Social Worker and Legal Status.



This screen is completed in the same way as the other screens within the Personal Details module. When details are completed, they are saved by pressing the

button.

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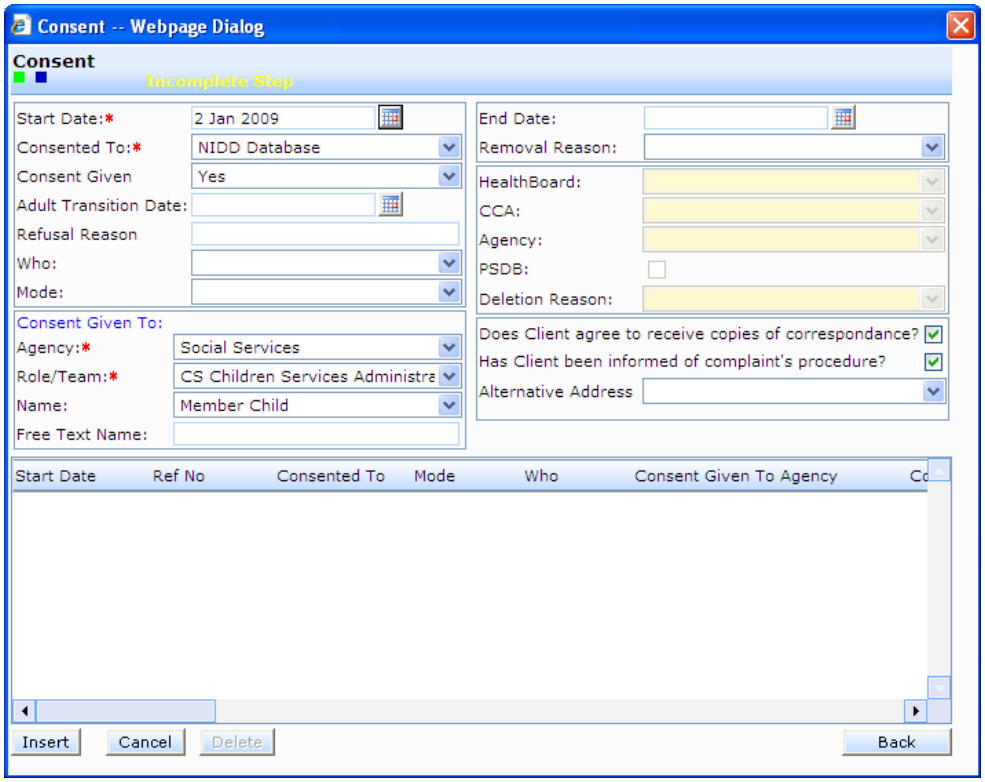
Consent

The Consent screen is used to capture information about consent that the client may have given or refused, and to whom they communicated that consent/refusal.



The relevant information is entered in the fields on screen, and clicking the

button saves the Consent Information. Multiple records can be entered into this screen.

The **Adult Transition Date** field has been introduced in relation to Contact Point. Once Contact Point and all related functionality are active, there will be an option of **Contact Point Adult Transition** in the **Consented To** field. The Adult Transition Date field is disabled, and will only become enabled once **Contact Point Adult Transition** is selected in the **Consented To** field. The **Adult Transition Date** will be a mandatory field when it is enabled, and its purpose is for users to specify the date when the young person's record should be archived on Contact Point.

Paper Files

The paper files button is located at the bottom of the Personal Details screen.

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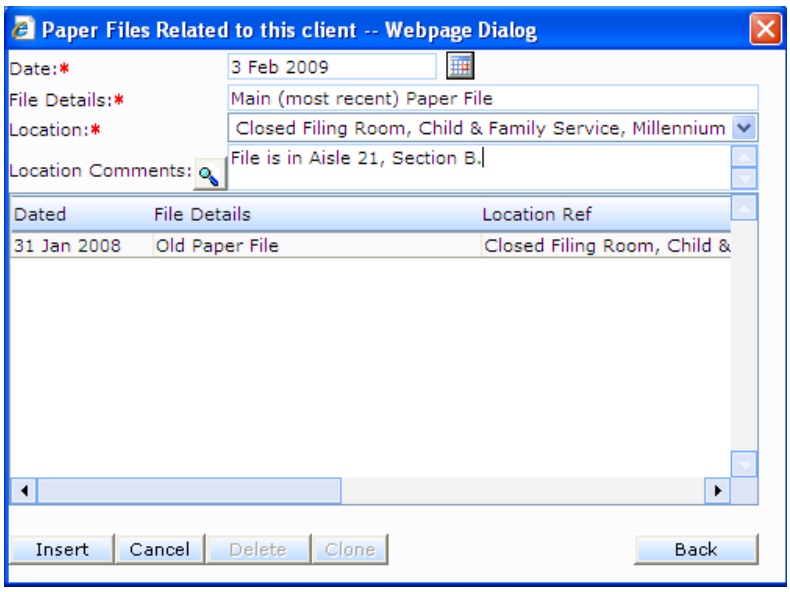
Clicking on this button allows the user to record the location of any paper files associated with the client. **Date** of entry, description of paper file in **File Details** and its **Location** are filled in the appropriate fields.



The Insert button is clicked to insert this record. A date is required in this screen, and the user is prompted to supply the date if it is not entered.

It is possible to update and delete Paper File records by selecting the relevant record in the list (by single clicking to highlight it) then clicking the relevant button, Update or Delete buttons.

It is also possible to clone a Paper File entry from one client record, to another client record, or even from one referral on a client, to another referral on the same client, by highlighting the record in the list and clicking the Clone button.
If cloning to a different client, then the client you are cloning **to** must have a relationship with your current client, and also a referral for the cloned entry to be stored on.

Note: If this is not the case, when the clone button is clicked, the client you wish to clone to will **not** be displayed in the cloning screen.

Once the Clone button is clicked, a window opens to display the clients who have a relationship with the current client, what the relationship is and by default, the corresponding open referrals for the current client and their relationship clients (with referral number and date of referral). The relationships and referrals listed by default are those that the user has access to according to Profile Based Security.

Referrals **not** listed by default are those that are Closure Requested, Closed Fully, or those to which the user does **not** have access to according to Profile Based Security.

However, on ticking Show All within the cloning screen, **all** of these referrals will become displayed for the user to clone to.

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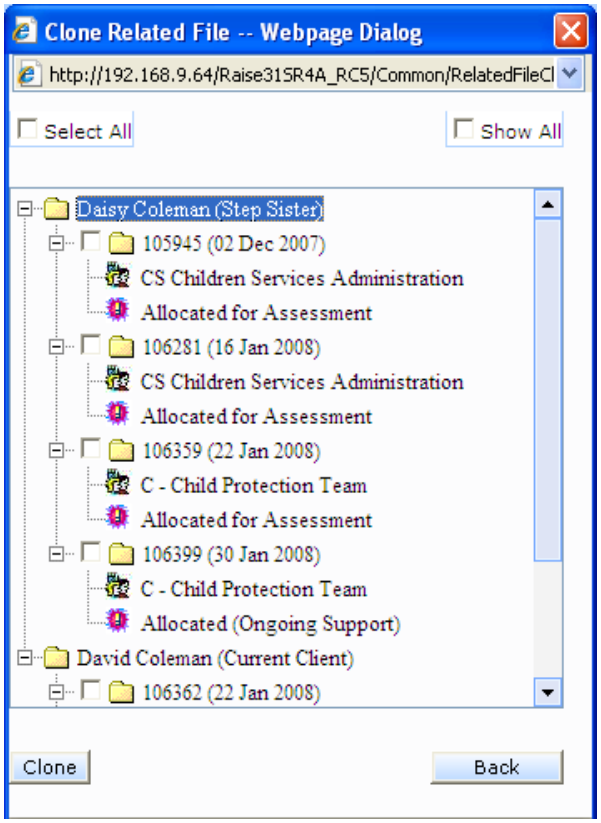
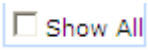
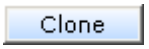


The allocated team and action taken are also displayed under each referral to assist with selection, prompting the user to select which referral the record is going to be cloned 'to' under the relevant client, by ticking its 'check box'.

The current client is also listed, enabling users to clone information from one referral to another/others for the same client.

Un-ticking 

will return the clone screen to the default display, excluding removing all referrals from the list that are Closure Requested, Closed Fully or where the user does not have access to the referrals according to Profile Based Security.

Once the relevant referral or referrals have been ticked, the 

button is then used to copy the record from the current client referral onto the selected client's record and referral(s). A message is displayed informing the user that the related file has been successfully cloned.

Attached Files

The attached files button is also located at the bottom of the Personal Details screen and it allows the user to attach electronic files associated to the client. A **Caption** describing the attachment, the **Document** location within the electronic filing system and the **Date** it was attached, are recorded on the form in the appropriate fields:

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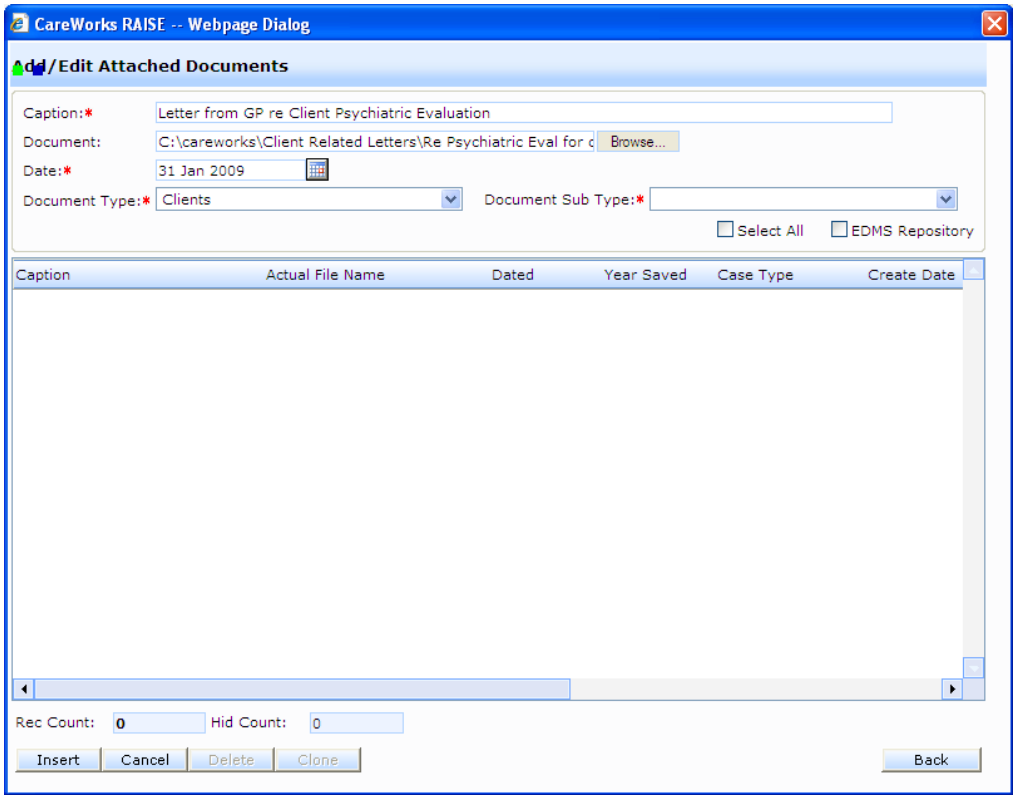

The Insert button is pressed to insert this record. The Browse... button is used to navigate the computer filing system to select the required file, and the file path is then automatically recorded. A date is required on this form. The user is prompted to supply the date if it is not entered.

The **Document Type** and **Document Sub Type** are used to categorise documents for viewing in the Document View module. **Document Type** refers to the module the document is being attached to, while **Document Sub Type** describes the document being attached.

The Back button is used to return to the Referral screen.

It is possible to Update, Delete and Clone Attached File records in exactly the same way as described above for related Paper Files.

An attached document is viewed by double clicking on its name in the list of documents.

The maximum size of attached files is 8MB.

Transferring Client Records between Organisations

If a client relocates to a new geographic area but still requires support, you can transfer a client record to a new social care organisation. You can also import a record for a new client from their previous social care provider.

Attachments and documents are not transferred as part of the client record.

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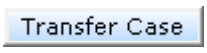
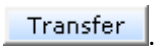
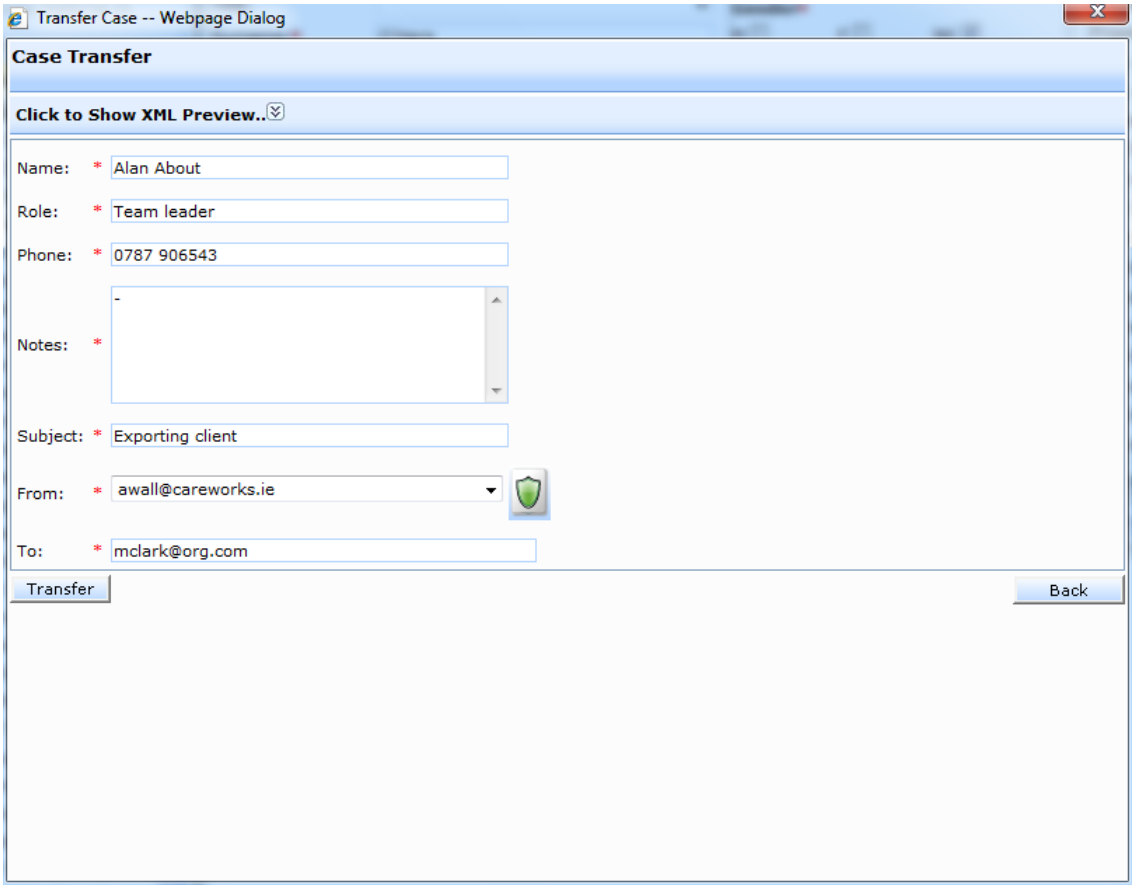
Exporting a Client Record

You can transfer a client record in an XML format.

To export a client record:

1. Select a client in Personal Details.
2. Click the **Transfer Case**  button.
3. The *Transfer Case* window opens.
4. Complete the mandatory fields, including the recipient's e-mail address and click **Transfer**  .



The recipient receives an XML file which contains the client details. They can then import this universal standard into their system.

Note: You can review the data being exported in an XML format be selecting *XML Preview* **Click to Show XML Preview..**

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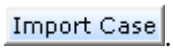
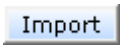
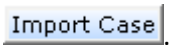
Importing a Client Record

You can import a client record in an XML format from another organisation.

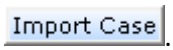
To import a client record:

1. Select the **Client Search** module.
2. Click **Import Case**  .
3. Select an XML file, by clicking **Select File** . You will receive a message if the file is successfully loaded.
4. Click **Import**  to start the import process.
5. The client record is displayed, select the client recordand click **Import Case**  . The new client is number is displayed.
6. Click **Close**.

The case is now successfully imported.

Merging Duplicate Clients

When importing a client from another YOT, you may already have a partial record of the same client. You can merge these two records when importing the new client record.

1. Select the **Client Search** module.
2. Click **Import Case**  .
3. If there is a duplicate record, the *Duplicate Client Analysis* window launches.
4. Select the existing client record, and click **Merge...**

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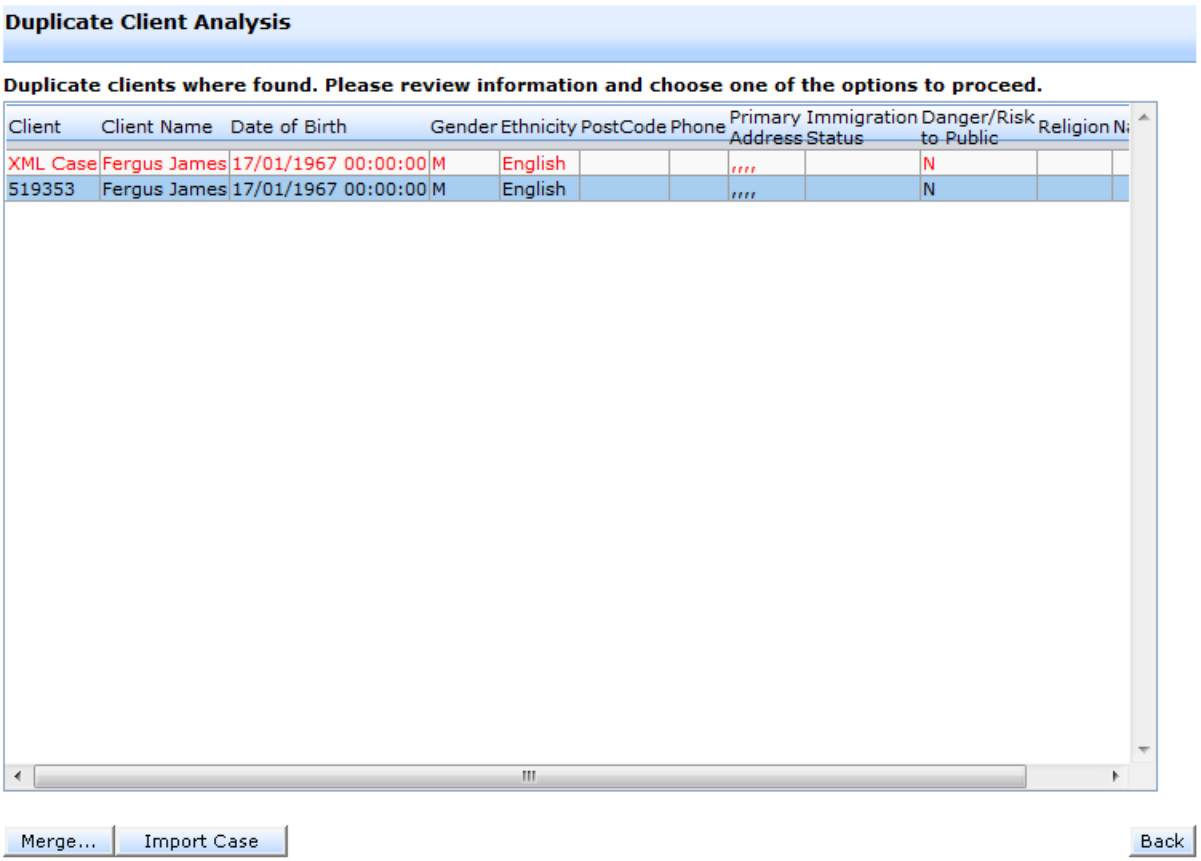

5. A message is returned that the case was successfully imported.

6. Click **Close.**

Now, both the imported and the existing record are successfully merged.

Searching Imported and Exported Clients

You can trace any imported or exported clients in the *YOT Case Transfer Audit* module. All clients imported or exported can be traced here.

The module has a number of filters which can be set to allow you to search for clients. You can search by client number, action taken (imported or exported) and a range of dates between which the client may have been imported or exported.

All imported files have a log file which can be viewed.

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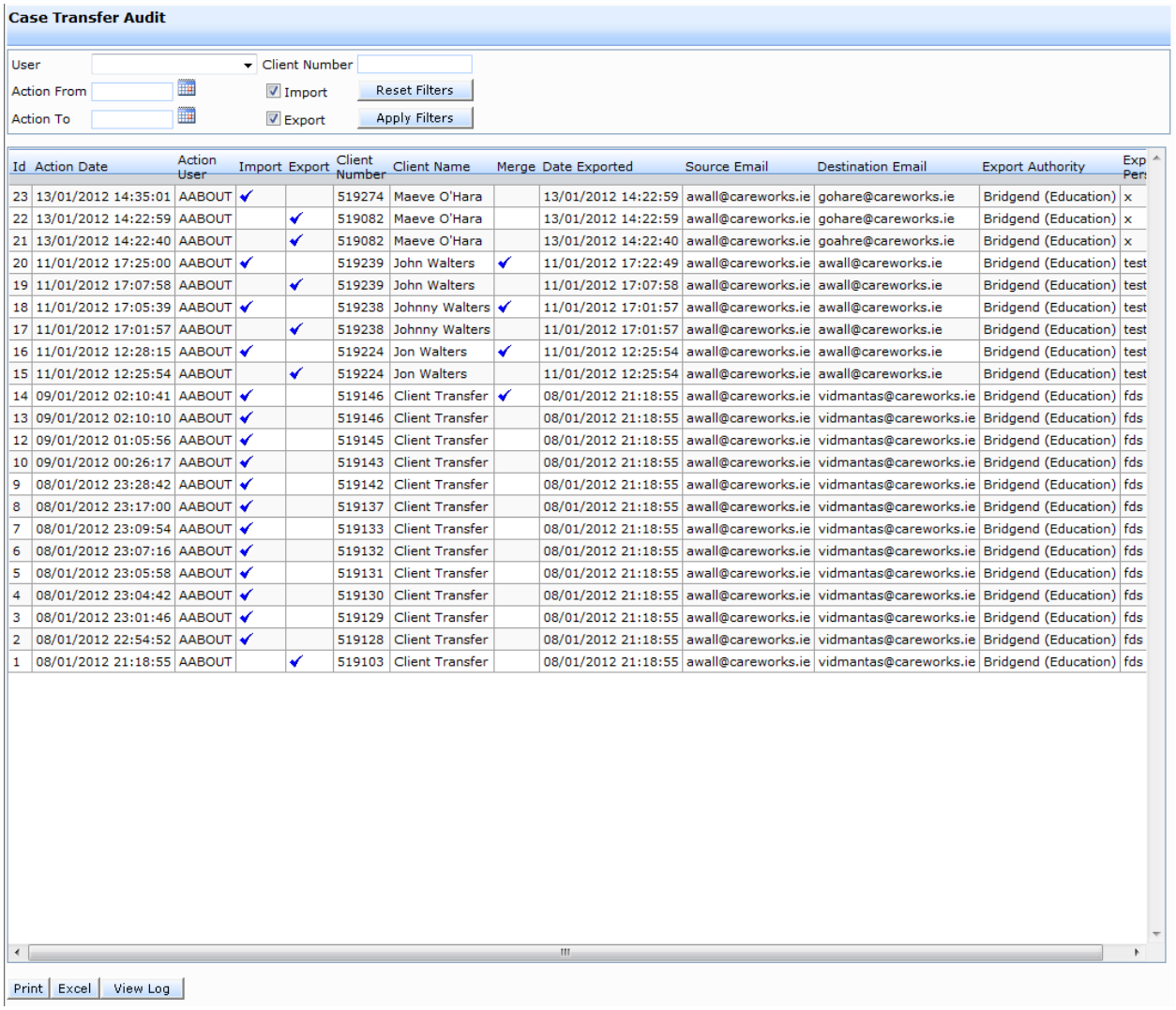

Id	Action Date	Action User	Import	Export	Client Number	Client Name	Merge	Date Exported	Source Email	Destination Email	Export Authority	Exp Per
23	13/01/2012 14:35:01	AABOUT	✓		519274	Maeve O'Hara		13/01/2012 14:22:59	awall@careworks.ie	gohare@careworks.ie	Bridgend (Education)	x
22	13/01/2012 14:22:59	AABOUT		✓	519082	Maeve O'Hara		13/01/2012 14:22:59	awall@careworks.ie	gohare@careworks.ie	Bridgend (Education)	x
21	13/01/2012 14:22:40	AABOUT		✓	519082	Maeve O'Hara		13/01/2012 14:22:40	awall@careworks.ie	goahre@careworks.ie	Bridgend (Education)	x
20	11/01/2012 17:25:00	AABOUT	✓		519239	John Walters	✓	11/01/2012 17:22:49	awall@careworks.ie	awall@careworks.ie	Bridgend (Education)	test
19	11/01/2012 17:07:58	AABOUT		✓	519239	John Walters		11/01/2012 17:07:58	awall@careworks.ie	awall@careworks.ie	Bridgend (Education)	test
18	11/01/2012 17:05:39	AABOUT	✓		519238	Johnny Walters	✓	11/01/2012 17:01:57	awall@careworks.ie	awall@careworks.ie	Bridgend (Education)	test
17	11/01/2012 17:01:57	AABOUT		✓	519238	Johnny Walters		11/01/2012 17:01:57	awall@careworks.ie	awall@careworks.ie	Bridgend (Education)	test
16	11/01/2012 12:28:15	AABOUT	✓		519224	Jon Walters	✓	11/01/2012 12:25:54	awall@careworks.ie	awall@careworks.ie	Bridgend (Education)	test
15	11/01/2012 12:25:54	AABOUT		✓	519224	Jon Walters		11/01/2012 12:25:54	awall@careworks.ie	awall@careworks.ie	Bridgend (Education)	test
14	09/01/2012 02:10:41	AABOUT	✓		519146	Client Transfer	✓	08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
13	09/01/2012 02:10:10	AABOUT	✓		519146	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
12	09/01/2012 01:05:56	AABOUT	✓		519145	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
10	09/01/2012 00:26:17	AABOUT	✓		519143	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
9	08/01/2012 23:28:42	AABOUT	✓		519142	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
8	08/01/2012 23:17:00	AABOUT	✓		519137	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
7	08/01/2012 23:09:54	AABOUT	✓		519133	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
6	08/01/2012 23:07:16	AABOUT	✓		519132	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
5	08/01/2012 23:05:58	AABOUT	✓		519131	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
4	08/01/2012 23:04:42	AABOUT	✓		519130	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
3	08/01/2012 23:01:46	AABOUT	✓		519129	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
2	08/01/2012 22:54:52	AABOUT	✓		519128	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds
1	08/01/2012 21:18:55	AABOUT		✓	519103	Client Transfer		08/01/2012 21:18:55	awall@careworks.ie	vidmantas@careworks.ie	Bridgend (Education)	fds

Summary

You should now be familiar with

- Updating Religion, Phone Number and Other Personal Details of a client
- Recording Health Details including details of a client's GP, Disability Details and Hospital Admissions
- Recording Education Details of a client including Schools, Special Needs Education and Examinations
- Using other tabs and buttons on the Personal Details screen to record or update details about a client, such as Employment, Legal Status, Significant Events, Alias, Consent, etc
- Viewing any Client Merge and Audit Information
- Recording, Cloning & Viewing Paper File locations, and Recording, Cloning & Viewing Attached Files
- Transferring Client records from one organisation to another.

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Chapter 4) Dashboards

Overview

Dashboards have a number of views that enable logged in users to display a graphic view of their cases. The records of a young person can be opened from a dashboard.

Viewing a Dashboard

To view a dashboard, do the following:

1. Click **Dashboards** under *My Raise*.
2. Select the type of dashboard you want to display from the Dashboard drop-down list. The following options are available:
   - Case Summary Dashboard — for more information, see Case Summary Dashboard.
   - Prevention Dashboard — for more information, see Prevention Dashboard.
3. Select the agency of the cases you want to view from the *Agency* drop-down list.
4. Select the team of the cases you want to view from the *Team* drop-down list.
5. Select the worker whose cases you want to view from the *Worker* drop-down list.
6. Click **Apply Filters**.

The dashboard is displayed in a grid form, with column title along the top, and the cases listed under the person who has responsibility for the young person's cases.

Case Summary Dashboard

The *Case Summary* dashboard enables case managers to display a summarised view of their cases. It displays all open programs for which you are the responsible worker or the responsible worker of the intervention and all open referrals with no open program for which you are the primary or secondary allocated worker.

This dashboard displays the following summary fields:

Columns	Description
Current Cases	Displays the number of cases displayed on the dashboard as calculated from Asset Plus assessments.
Very High/High Risk	Displays the number of cases where the risk is high (ROSH) as calculated from Asset Plus assessments.

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Columns	Description
Medium Risk	Displays the number of cases where the risk is medium (ROSH) as calculated from Asset Plus assessments.
Low Risk	Displays the number of cases where the risk is low (ROSH) as calculated from Asset Plus assessments.
New Primary Allocations	Displays a value for referrals only and not programs or interventions, where Action Taken is Allocated or Assigned to Team or Assigned to Worker.
National Standards	
Intensive	Displays the number of cases where the young person intervention level is Intensive as calculated from Asset Plus assessments.
Enhanced	Displays the number of cases where the young person intervention level is Enhanced as calculated from Asset Plus assessments.
Standard	Displays the number of cases where the young person intervention level is Standard as calculated from Asset Plus assessments.
Incomplete Documents	Displays the number of documents that have a start date but are not recorded as completed or concluded. These can be associated with a programme, referral, or hearing.

This dashboard displays the following fields for each client:

Columns	Description
Young Person	Displays the first and last name of the client.
Order	Displays the type of order that the young person is subject to.
Client No	Displays the person's ID number.
Ref No	Displays the person's reference number.

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Columns	Description
Length of Order in Months	Displays the length of the order in months.
Start date of Order	Displays the start date of the order.
Asset Date	Displays the date of the asset as retrieved from the Asset Plus assessment.
ROSH Date	Displays the date of the last calculated ROSH as retrieved from the Asset Plus assessment.
ROSH	Displays the client's last calculated Risk of Serious Harm level as calculated from the Asset Plus assessment.
VMP Date	Displays the date of the Vulnerability Management Plan as retrieved from the Asset Plus assessment.
VMP Review Date	Displays the date of the VMP Review as retrieved from the Asset Plus assessment.
RMP Date	Displays the date of the Risk Management Plan as retrieved from the Asset Plus assessment.
RMP Review Date	Displays the date of the RMP Review as retrieved from the Asset Plus assessment.
Legal Status	Displays the LAC or accommodation status.
Current School Hours	Displays the current school hours.
Borough	Displays the client's borough.
Ward	Displays the client's ward.

The grid is colour coded, as follows, to show when review dates are due:

- Green — review is due within one month.
- Yellow — review is due within two weeks.
- Orange — review is due within one week.
- Red — review is overdue.

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Prevention Dashboard

The *Prevention* dashboard displays a summary of all young people who are on a prevention program. It enables the prevention team to get a high level overview of their prevention cases and navigate to individual young people for more detail.

By default, this dashboard displays data for all open programs of type YJB Returns or Prevention Programs for which you are the responsible worker. You can also choose to filter by other teams or workers. This dashboard also shows data for all open referrals with no open program for which you are the primary or secondary allocated worker and the referral reason is Request for YOT Prevention Services or Request for Other Prevention Services.

This dashboard displays the following fields:

Columns	**Description**
Name	Displays the first name and last name of the client.
Client No	Displays the person's ID number.
Ref No	Displays the person's reference number.
Prog Type	Displays the type of the programme.
Prog Date	Displays the date of the programme.
Onset Score	Displays the current onset score.
Onset Change	Indicates if the client's current onset score is equal to the last onset score or has increased or decreased.
ROSH Level	Displays the client's Risk of Serious Harm level as calculated from the Asset Plus assessment.
VMP Level	Displays the client's current VMP level as calculated from the Asset Plus assessment.
Previous Outcomes	Lists all of the client's outcomes prior to the start of the prevention program.
Secondary Allocations	Displays the client's secondary allocations with a start date but no end date.

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Columns	Description
Legal Status	Displays the client's current legal status with a start date but no end date.
Client Ward	Displays the client's ward.
Client Borough	Displays the client's borough.
Current School Hours	Displays the client's school hours.

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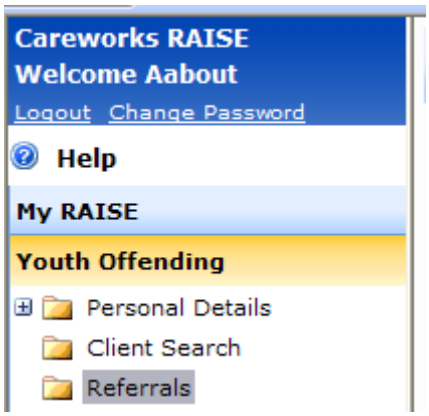
Chapter 5) Referrals

Referrals are a result of when a contact is received by a Youth Offending Service, which in turn needs to be recorded because of the possibility of on-going work. A referral represents an episode in a young person's life and in the Youth Offending context that is when they are at risk of or actually offending. A young person can have one or many referrals and a Referral will **always** be linked to a client. Each Referral may have associated offences, hearings, assessments, interventions and programmes.

Creating Referrals

To access the Referrals module, you click on the appropriate icon on the left hand side of the screen:



The start point for a new Referral is the creation a new person or finding an existing person. A search for the person is initiated using the Client Search facility.

When the relevant Personal Details are displayed on the screen, you select the **Referrals** module. A screen will be displayed showing any existing Referrals for that client:

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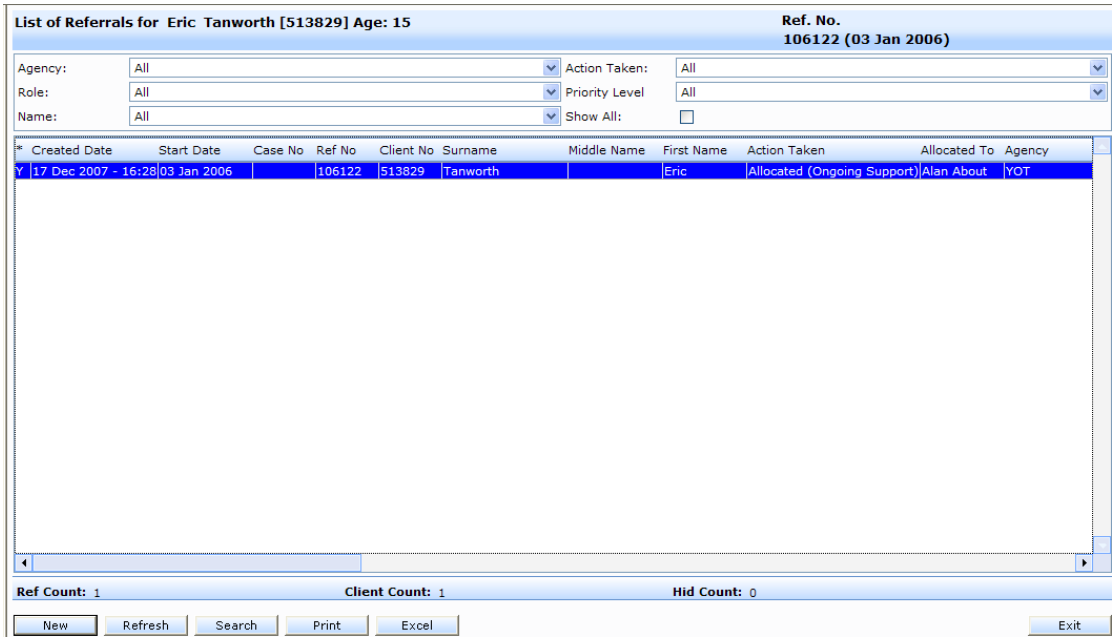
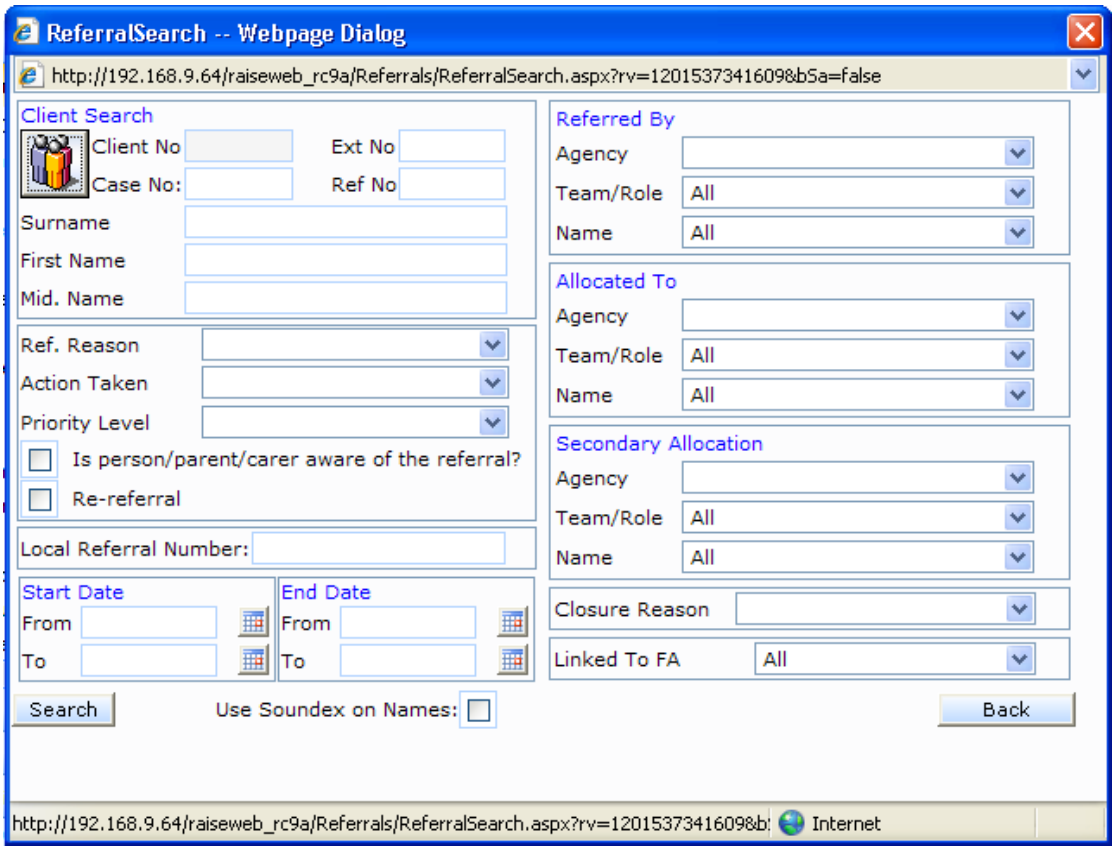

List of Referrals for Eric Tanworth [513829] Age: 15
Ref. No.
106122 (03 Jan 2006)
Agency: All
Role: All
Name: All
Action Taken: All
Priority Level All
Show All:
* Created Date Start Date Case No Ref No Client No Surname Middle Name First Name Action Taken Allocated To Agency
Y 17 Dec 2007 - 16:28 03 Jan 2006 106122 513829 Tanworth Eric Allocated (Ongoing Support) Alan About YOT
Ref Count: 1
Client Count: 1
Hid Count: 0
New
Refresh
Search
Print
Excel
Exit

Note: There are a number of buttons on this screen. Their functions are as outlined below.



The Print button allows you to print off referrals:

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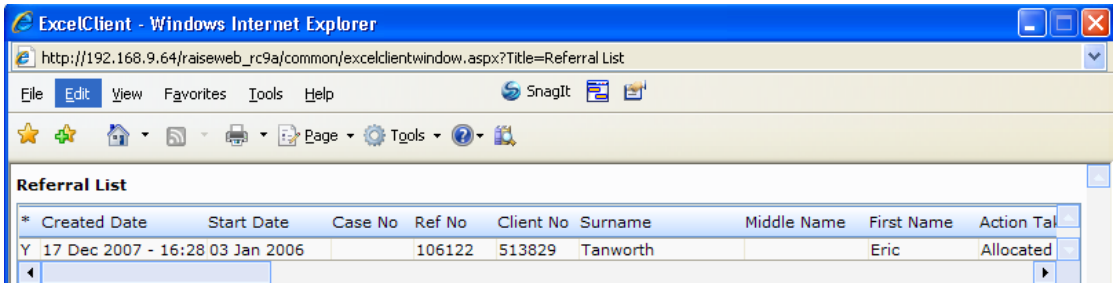
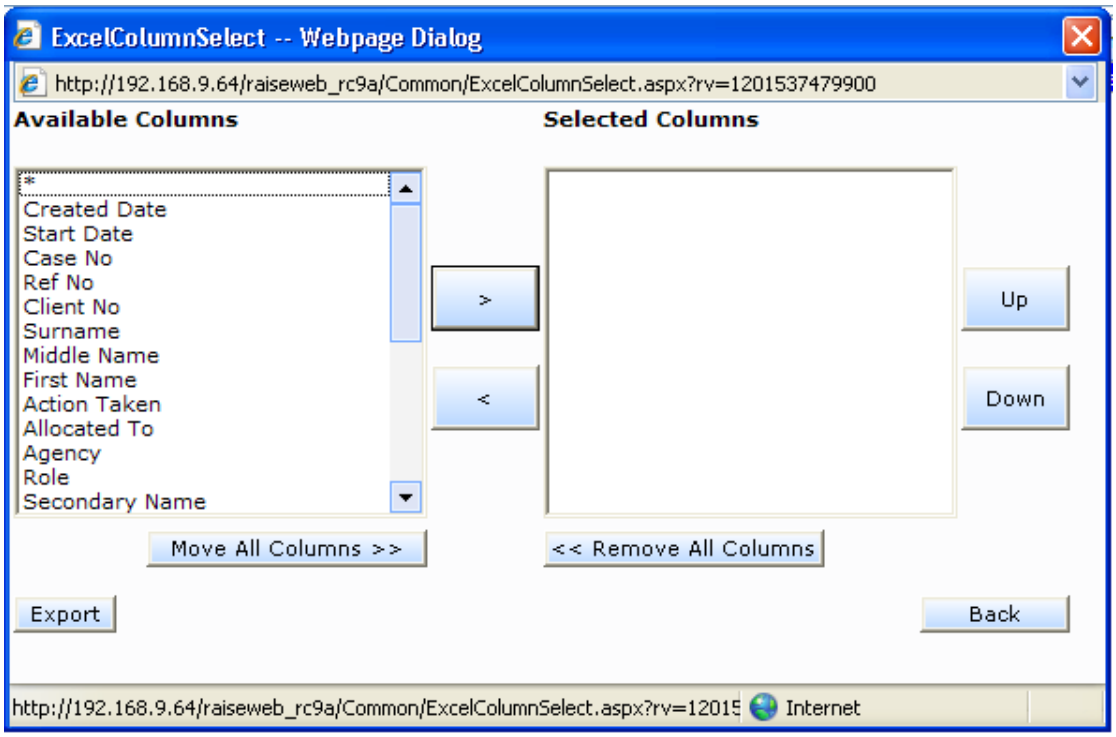

ExcelClient - Windows Internet Explorer
http://192.168.9.64/raiseweb_rc9a/common/excelclientwindow.aspx?Title=Referral List
File Edit View Favorites Tools Help
SnagIt
Page Tools
Referral List
* Created Date Start Date Case No Ref No Client No Surname Middle Name First Name Action Tal
Y 17 Dec 2007 - 16:28 03 Jan 2006 106122 513829 Tanworth Eric Allocated

The Excel **button allows you choose details of referrals and export to Excel:**



To create a new Referral, click the New button, which displays the Referral Details form. The name of the selected client is shown in the banner at the top of the screen.

> **Note:** Your system may be configured so that you can only create a single referral for a client. If you need to have multiple open referrals for the same client, contact your Raise System Administrator.

If you are creating a referral for an existing client you will have to choose the right workflow step:

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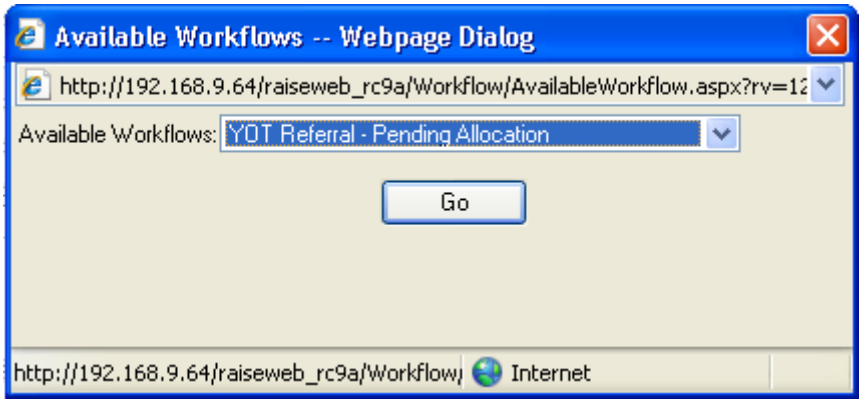


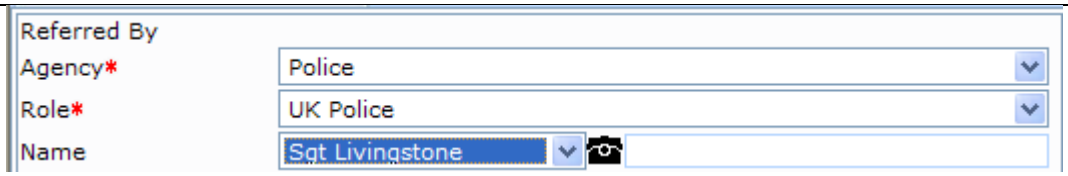
Once the screen is active within the 'Referred By' section you click on Agency and select the agency that has initiated the referral:

You then choose the Role/Team that referred from that agency:

There are three options available for recording the name of the Referrer.

- If there is a predefined list of names of people who fill specific roles within a particular agency, then that name may be selected from the Name drop down list. For example, if a school initiate a Referral and their names are already set up, then it would be possible to select a teacher's name.
- If the name is not available in the list, you may record the name and phone number in the free text fields.
- The Zoom button beside the Referrer field can be used to search the **YOT** database for details about the Referrer and contact details may be added directly to the database. This allows inclusion of additional contact details, such as address, for the Referrer.

Note: Despite not having a red asterisk a name must be recorded.



Select Mode to record how the Referral was received:

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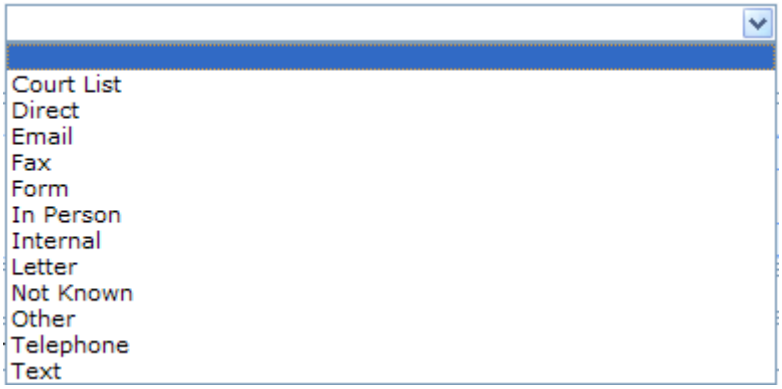
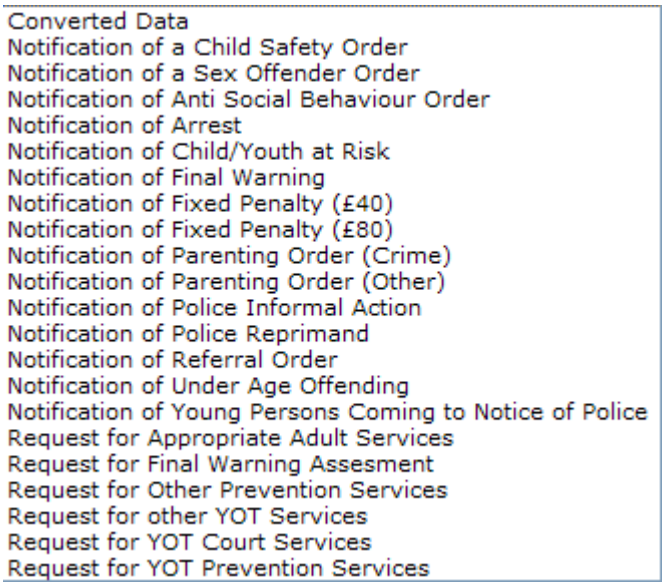


It is also necessary to include a **Reason** from a pre-defined list in the Reason field:


Converted Data
Notification of a Child Safety Order
Notification of a Sex Offender Order
Notification of Anti Social Behaviour Order
Notification of Arrest
Notification of Child/Youth at Risk
Notification of Final Warning
Notification of Fixed Penalty (£40)
Notification of Fixed Penalty (£80)
Notification of Parenting Order (Crime)
Notification of Parenting Order (Other)
Notification of Police Informal Action
Notification of Police Reprimand
Notification of Referral Order
Notification of Under Age Offending
Notification of Young Persons Coming to Notice of Police
Request for Appropriate Adult Services
Request for Final Warning Assesment
Request for Other Prevention Services
Request for other YOT Services
Request for YOT Court Services
Request for YOT Prevention Services

You can then record more details about the reason for the referral, in the free text box with that label. When the zoom button beside the field is pressed a larger window is opened to facilitate data entry:

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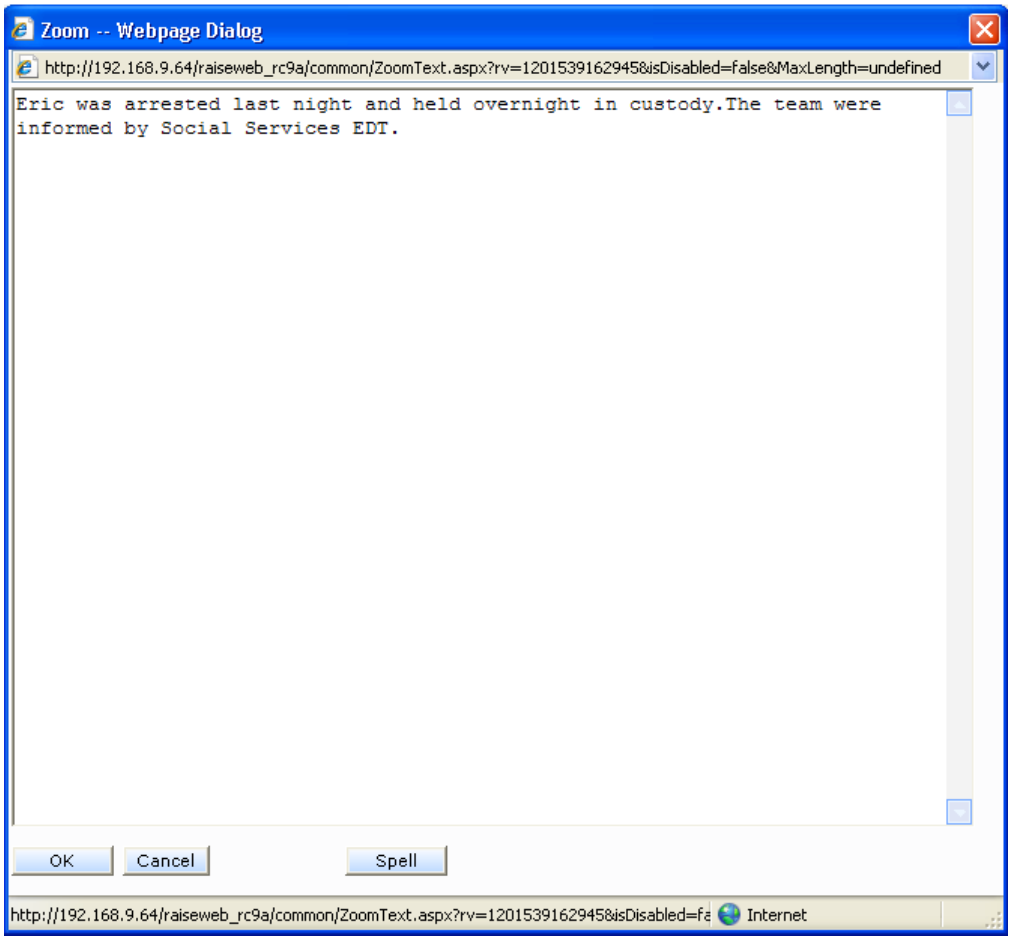
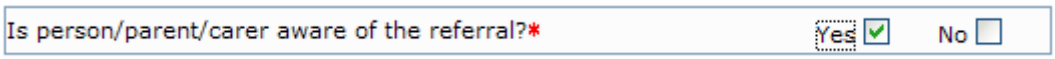


When all text is completed you can use Spell to check your spelling and you close by clicking on the OK button.

If the young person is a Child in Need and you know their number you record that fact:

The Yes box is clicked to insert a tick, indicating that the Person/Parent/Carer is aware of the Referral. If they are not aware then the No box is ticked.



Optionally it is possible to note that an Interpreter or Signer is required.

If so, then a further field is displayed to note whether one has been arranged.

You must state whether the young person is local or is from outside the borough or county:

The **Referral Taken By** section is already completed, with the details of the logged on user, although these details may be changed, if required.

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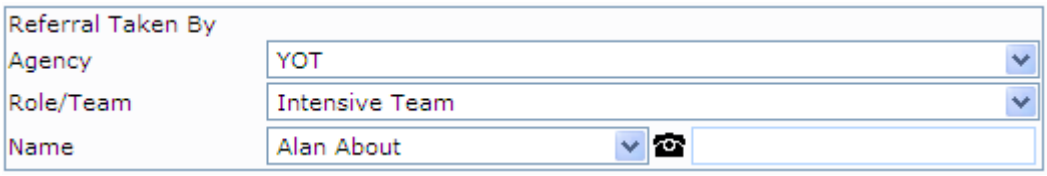
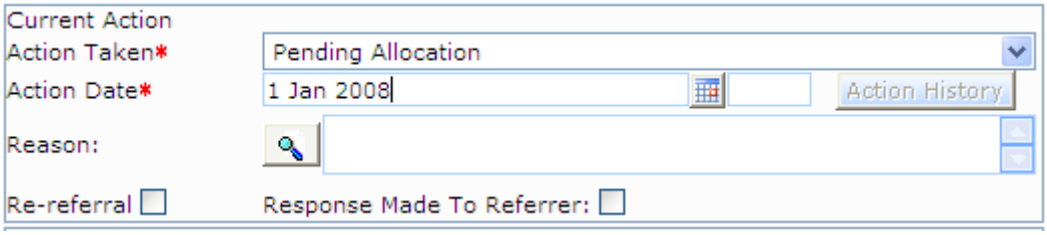
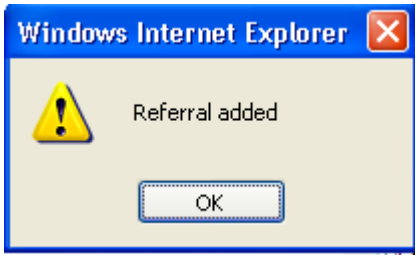


The **Action Taken** section records key dates at different stages of the Referral. During the creation stage, the initial Action Taken with its date is recorded, as well as the Reason for that action. The Action Date should always reflect the date that a task is undertaken, which is not necessarily the date that it is put on **CareDirector Youth**. The date and time that you enter the data is automatically stored, but the Actual Date entered is very important.

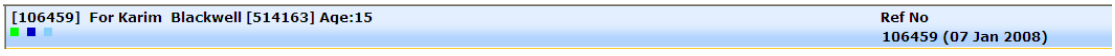
Date of Referral is considered to be the Action Date of the first Action taken which is that of Pending Allocation:



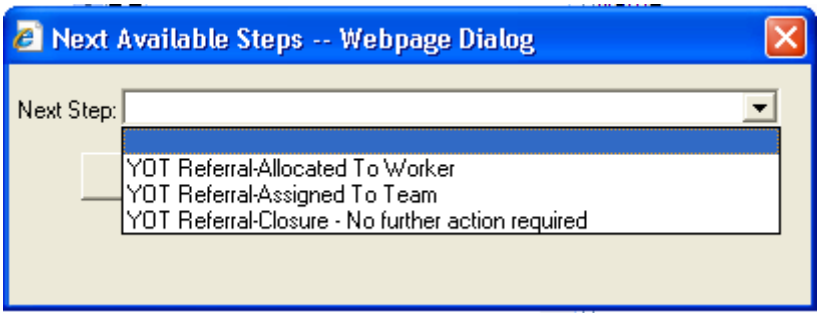
At this stage, all the necessary details for a new Referral have been recorded. To save these details, the Insert button is pressed. The details on the form are validated. If any mandatory fields are missing, you are prompted to complete them, before the Referral can be created. After validation, a new Referral is created and a unique Referral number is allocated. You will receive a confirmation message:



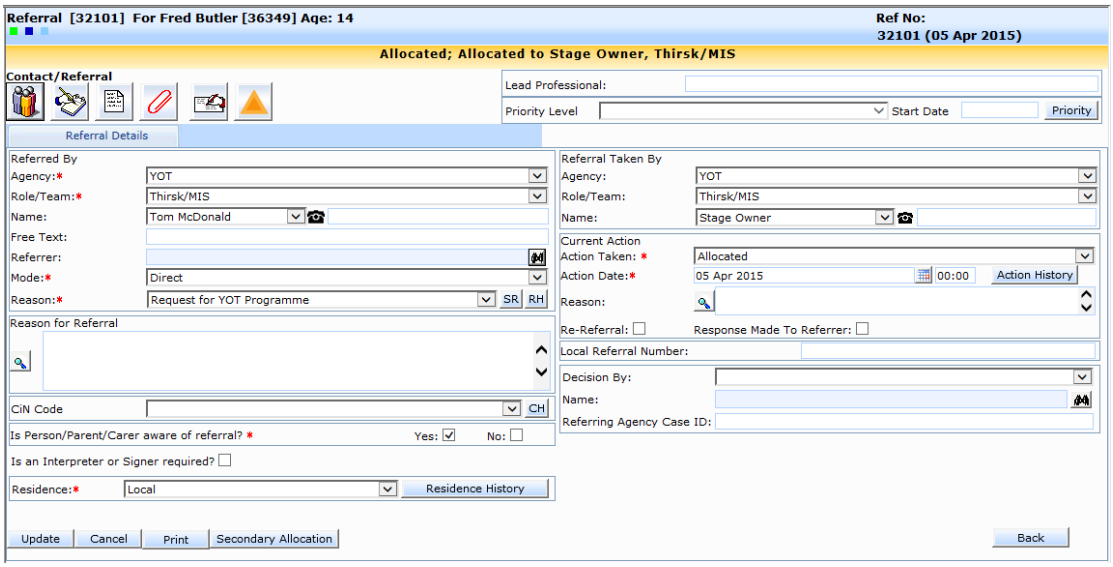
At this point the screen banner is updated to show the Referral Number:



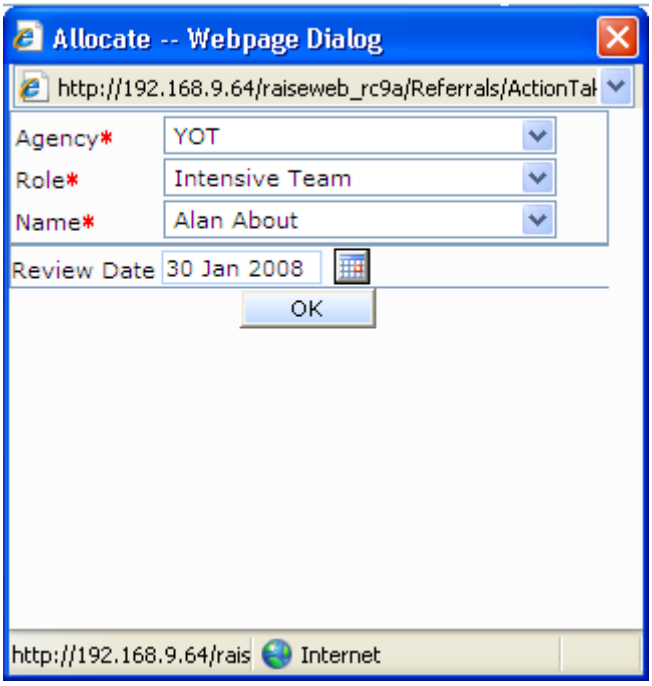
Workflow will automatically be triggered and you will be presented with the first options of workflow:


Next Available Steps -- Webpage Dialog
Next Step:
YOT Referral-Allocated To Worker
YOT Referral-Assigned To Team
YOT Referral-Closure - No further action required

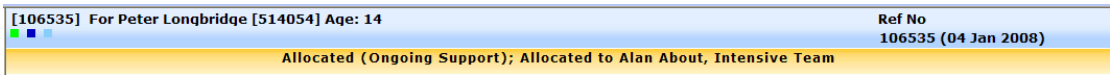
In this example you are allocating to a worker. You choose the step and click on the Go button:



It will return you to the screen with the Action Taken box now displaying 'Allocated (On-going Support)' although the banner is still showing 'Pending Allocation'. However it requires you to insert an Action Date* and click the Update button. You are then presented with the screen below to make your choices:



Clicking on OK will allocate the referral to a person and this will show in the Referral Banner:


[106535] For Peter Longbridge [514054] Age: 14
Ref No
106535 (04 Jan 2008)
Allocated (Ongoing Support); Allocated to Alan About, Intensive Team

You will also see an e-mail box that enables you to e-mail the allocated worker and inform them of any immediate issues:

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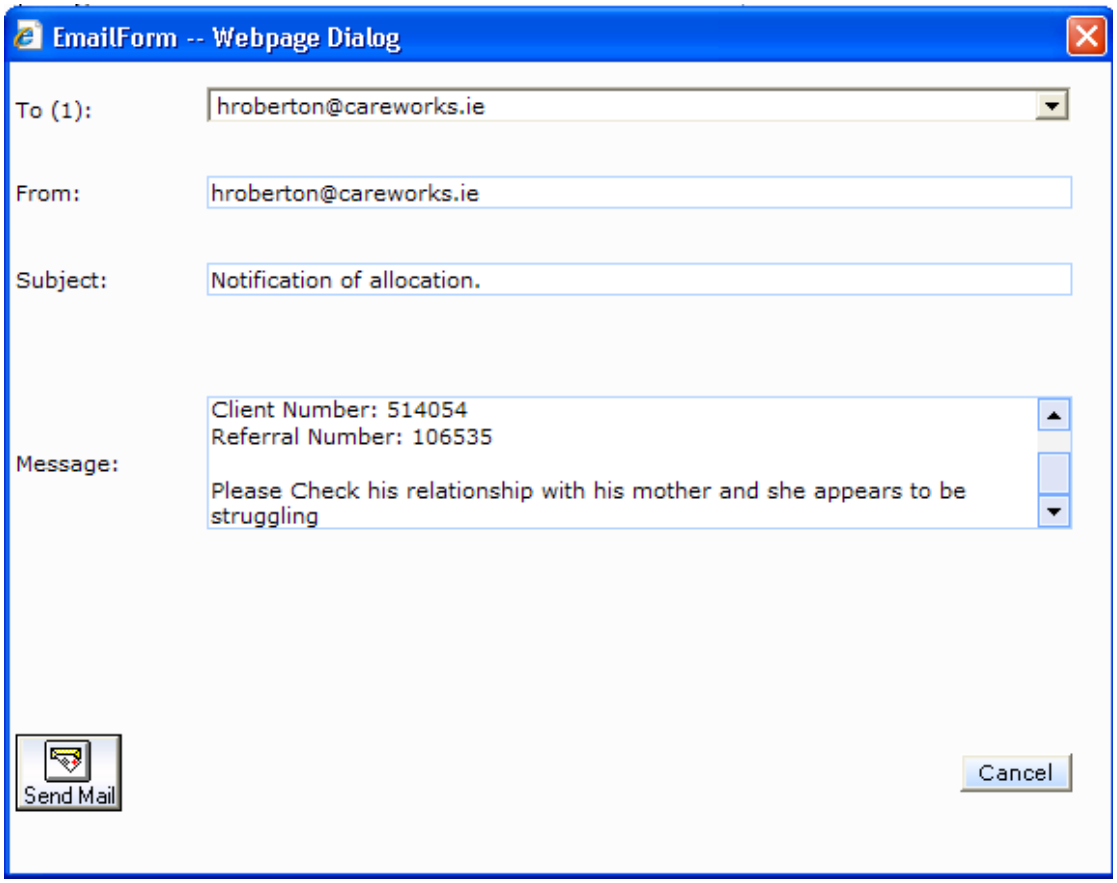
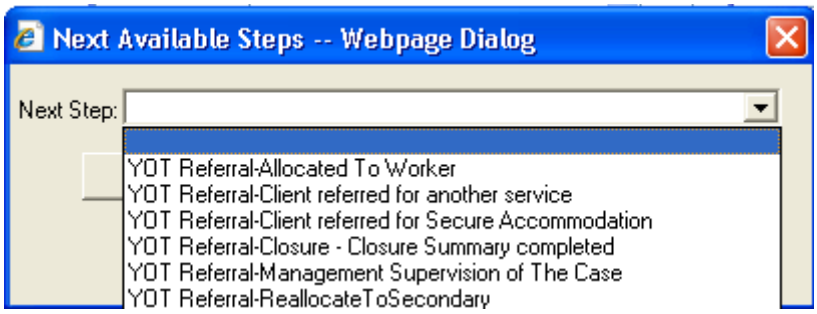


Clicking on will send the mail and you will receive a confirmation message:

Clicking on OK will bring back the workflow and you choose whether you want another step or to close the workflow:


Next Available Steps -- Webpage Dialog
Next Step:
YOT Referral-Allocated To Worker
YOT Referral-Client referred for another service
YOT Referral-Client referred for Secure Accommodation
YOT Referral-Closure - Closure Summary completed
YOT Referral-Management Supervision of The Case
YOT Referral-ReallocateToSecondary

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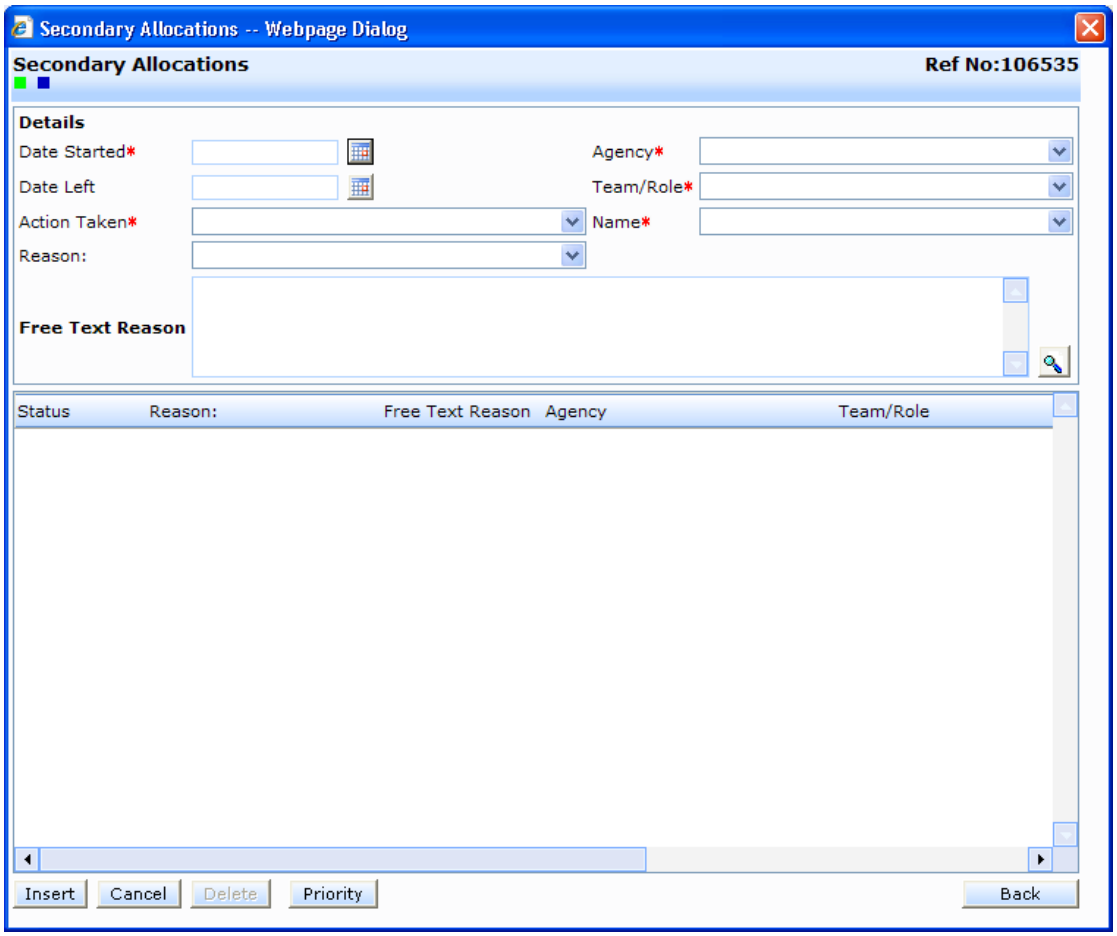
Allocating a Referral

When the referral is created and allocated there can only be one primary allocated worker but that person or their manager can secondary allocate the referral to one or more other practitioners.

Click on the Secondary Allocation button:



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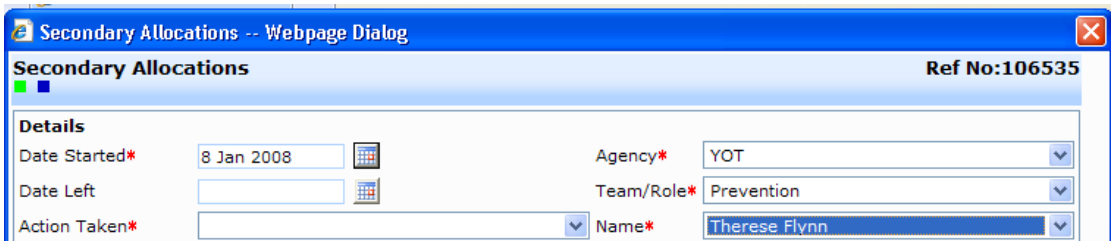
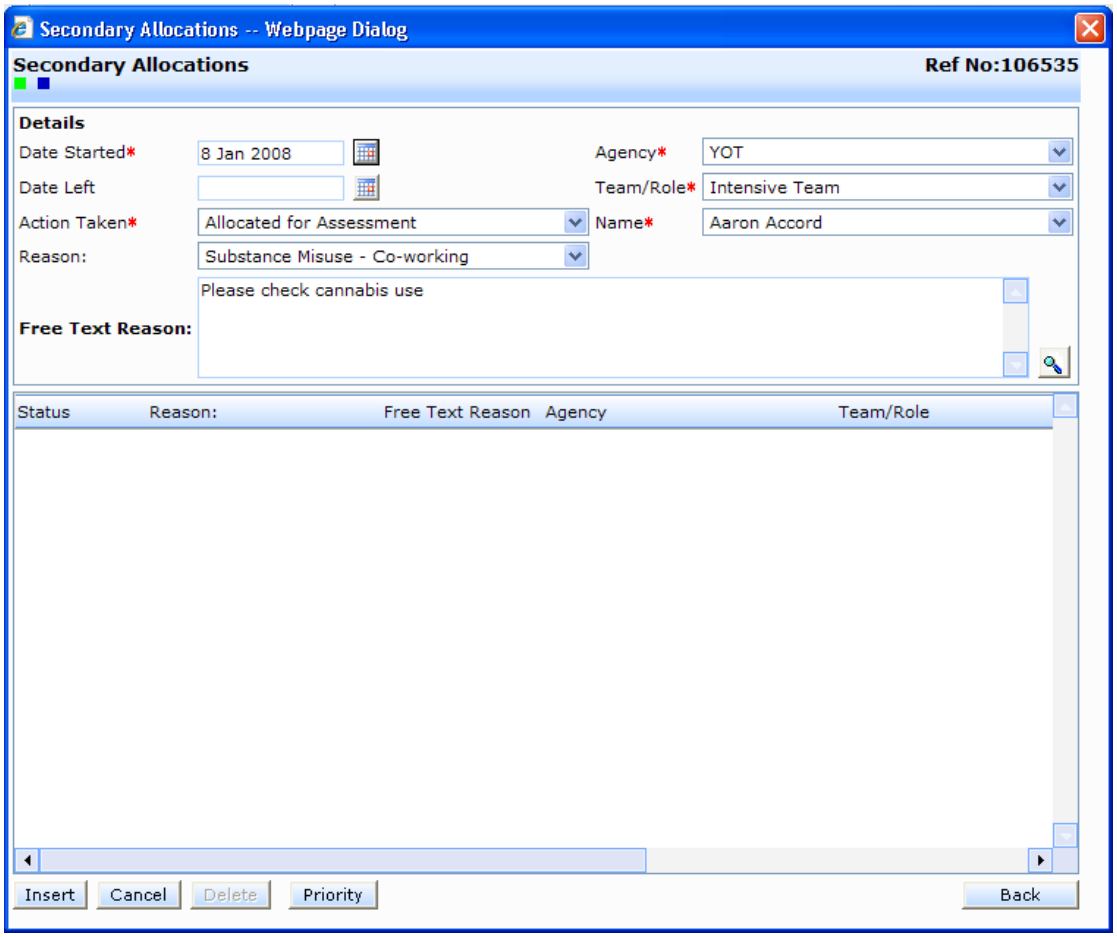
Enter the date started and using the Agency, Role and Name fields choose the practitioner that you want to involve.

Note: Those involved does not have to be restricted to just YOS staff.



Enter details for Action Taken, Reason and any Comments you wish to add:



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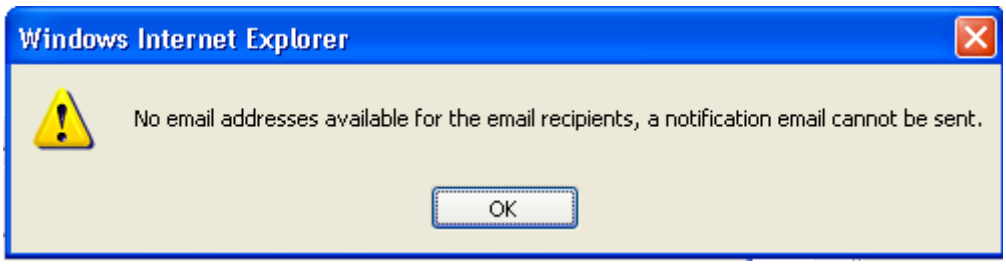
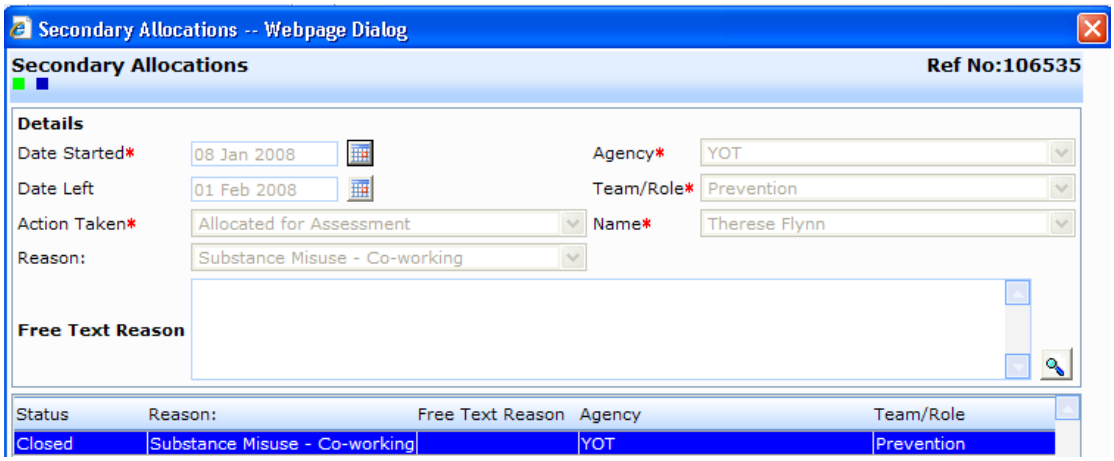
Clicking on insert will create the secondary allocation and allow the secondary worker to see it on their referral list. You will receive a confirmation message and will be able to e-mail that worker. If the worker has no e-mail address you will receive the following message:


Windows Internet Explorer
No email addresses available for the email recipients, a notification email cannot be sent.
OK

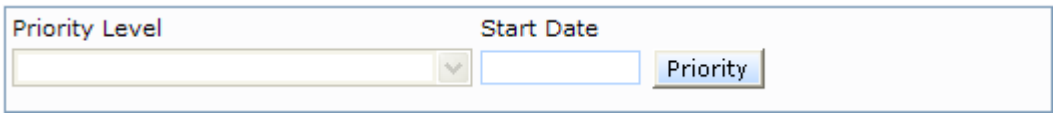
When a secondary worker has finished their involvement the status can be updated and the 'Date Left' box filled in:



Note: A referral cannot be closed by the primary worker if any secondary workers are still allocated to the referral.

Setting a Referral Priority

This section of the form is used to categorise Referrals to indicate urgency.



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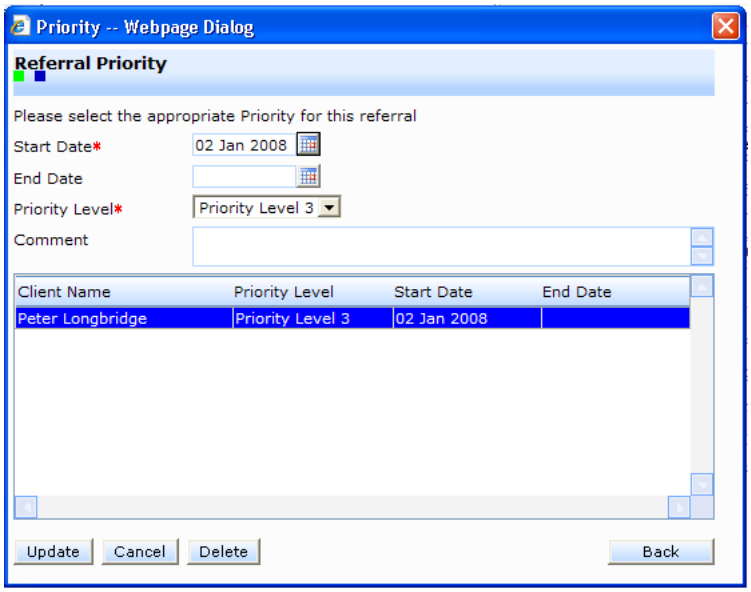
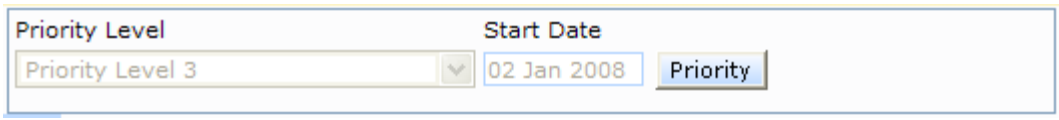
To assign a priority, you press the Priority button, which displays a new window. A priority level is selected from the drop down list, a date is chosen and you press the Priority button to insert this Priority Level:

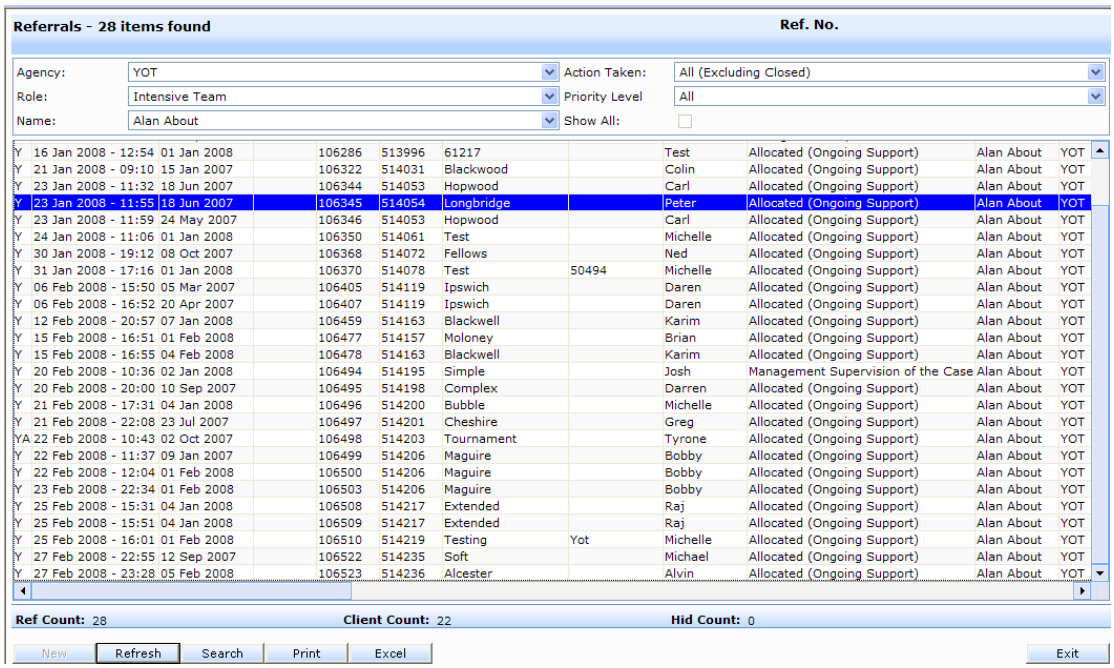


This will now show on the Referral itself:



Filtering Referrals

When **CareDirector Youth** opens and you go to the Referral screen, the first screen displays a default list of all referrals appropriate to you:

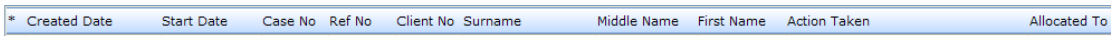


To filter by Team, select the Agency and Role. To filter by Person, select the Agency, Role and Name. You can filter additionally on Action Taken and Priority Level.

It is possible to scroll through the displayed list using the scroll buttons at the right hand side.

Sorting Referrals List

The Referral Listing may be sorted into a specific order, by clicking on the headings in the list. For example to list referrals in client surname order, point to the Surname heading and click once.



Searching for a Client Referral

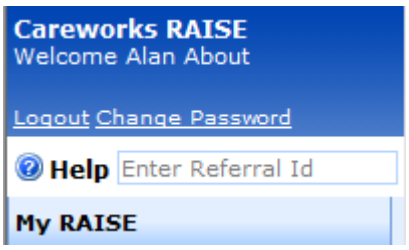
You can either search for a particular referral using the referral number, or you can search for any referrals which are for a particular client.

Note: All rreferrals on the system will be searched for those matching the criteria, but only those to which you have access will be displayed. Referrals you do not have access to will be displayed numerically in the Hid Count.

Searching for a Referral using Referral Number

You can search for a referral using the Referral **Ref No** field. This uses the referral number for each referral as the search criteria.

- In the *Enter Referral ID* field, type the referral number for the required referral and click **Enter.**



The referral is displayed in the main panel.

Searching for a Referral using the Client Personal Details

If searching for a referral for a specific client, the search is carried out in two steps:

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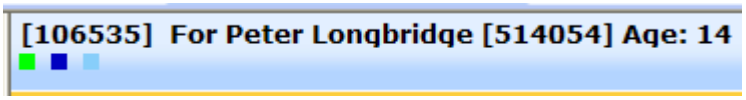
- Enter client details and click **Personal Details** to locate and select the relevant client record.

Any referrals for the client are displayed in the bottom pane of the personal details screen.

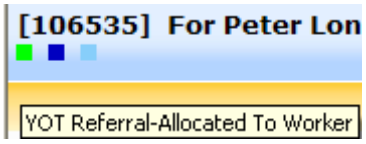
See Also Session 2 Searching for a client.

Re-Allocating a Referral

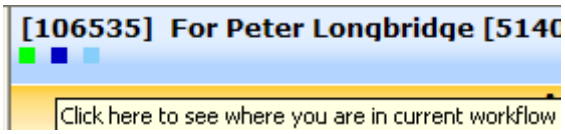
Any appropriate member of staff may re-allocate referrals, although only an allocated worker's manager may close referrals. If you need to do this you first need to pick up the workflow which is located in the top right hand corner of the screen:



The light green signifies the current step:



The dark blue signifies where you are in the overall workflow:



The light blue allows you to launch the workflow:

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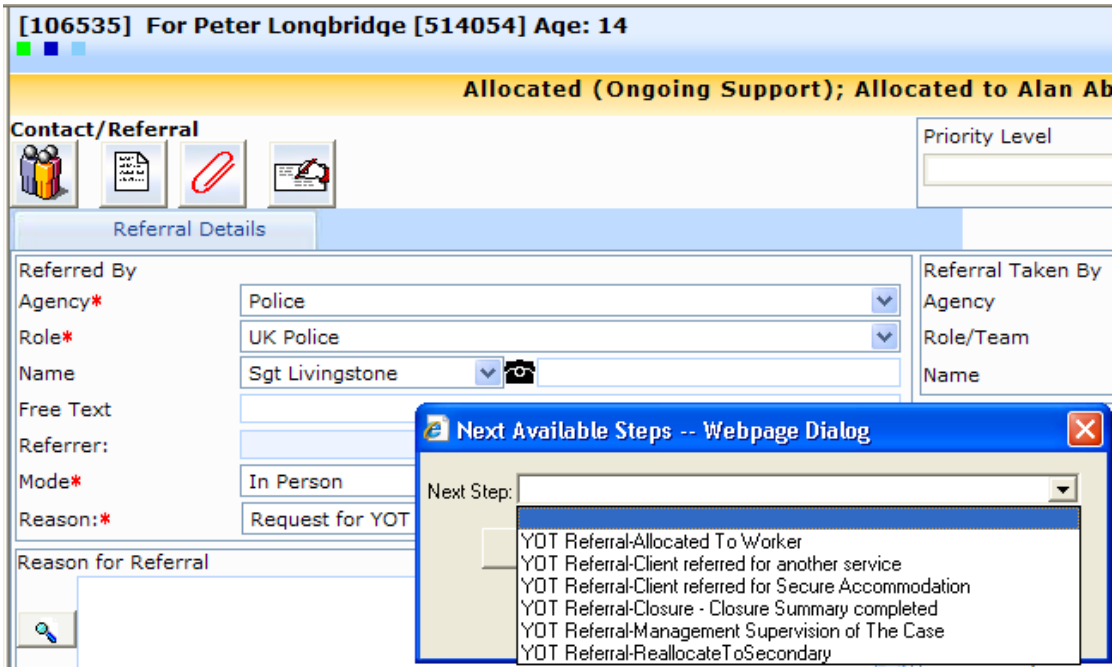
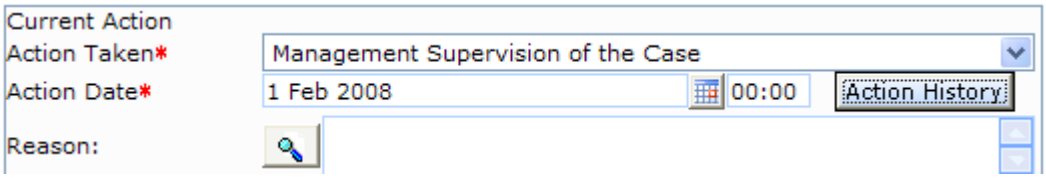


You would then go back through the stages described earlier to re-allocate the referral.

Referral Action History

You can see what workflow steps and management decisions have been taken in relation to a referral by clicking open the Action History.



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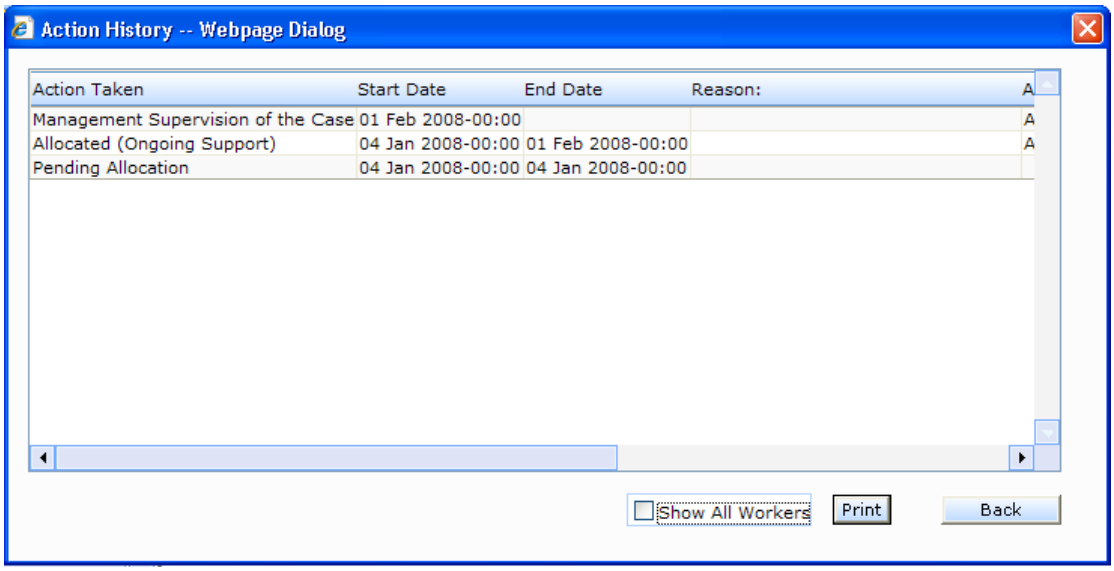
If you press the Action History button the following screen is displayed:



If you click on Show all Workers it will include those who are or have been secondary allocated to the referral.

This list may be printed by pressing the Print button when the list is displayed. The Back button returns you to the Referral screen.

Updating Residence

When the value in the *Residence* drop-down list is changed, CareDirector Youth records the date. You can view the residence history by clicking the **Residence History** button.

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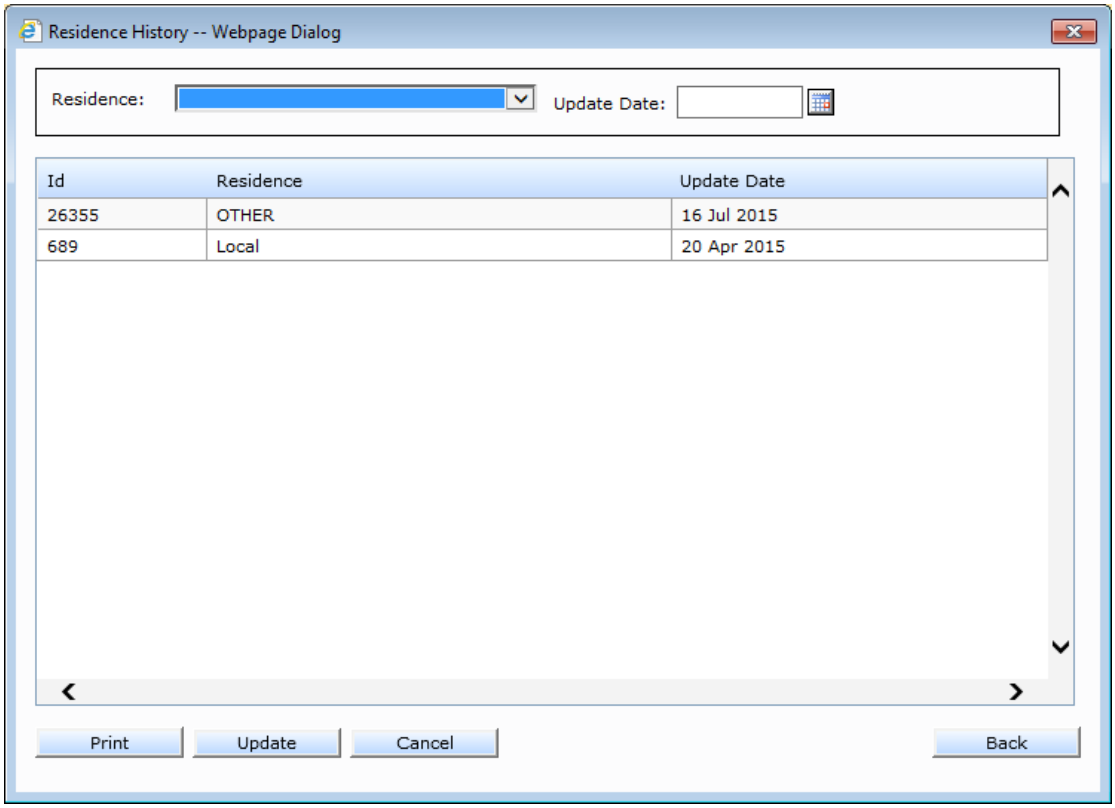

This screen lists the changes to the *Residence* field. You can modify the date of a change by selecting the change, setting the date in the *Update Date* field, and clicking the **Update** button.

Other Functions

You can carry out other functions within the referral.

The icon allows you to go to Personal Details of the particular person.

The icon allows you to record the location of any paper file:

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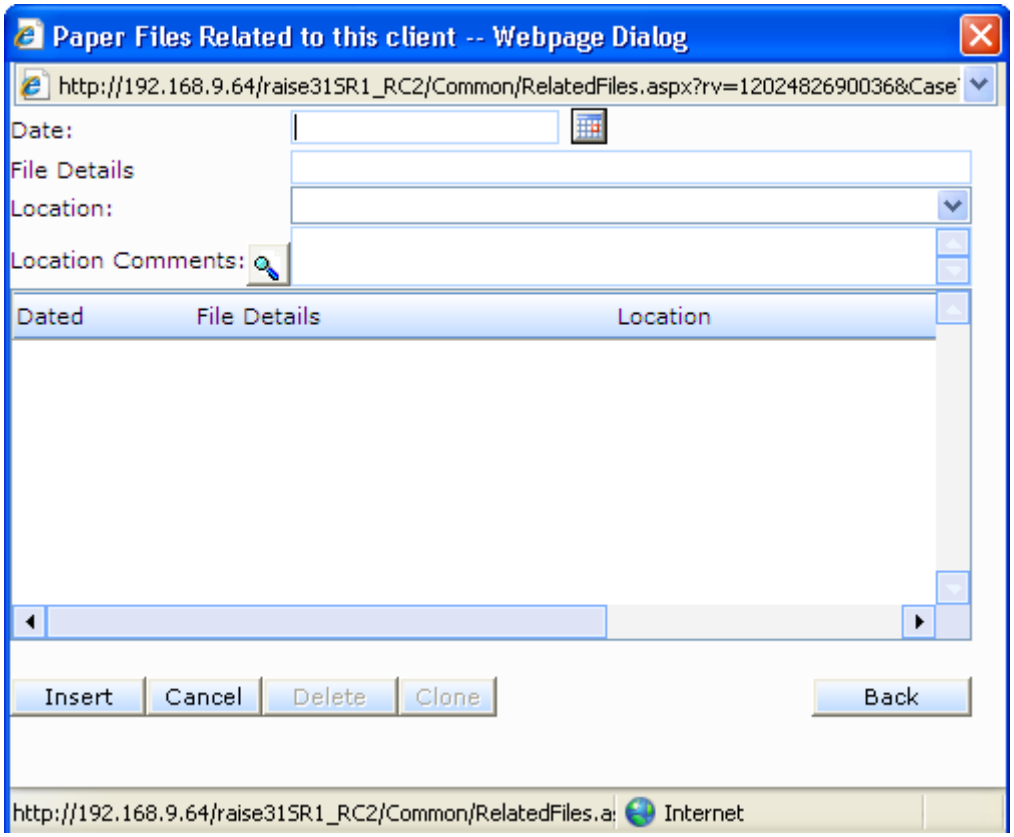
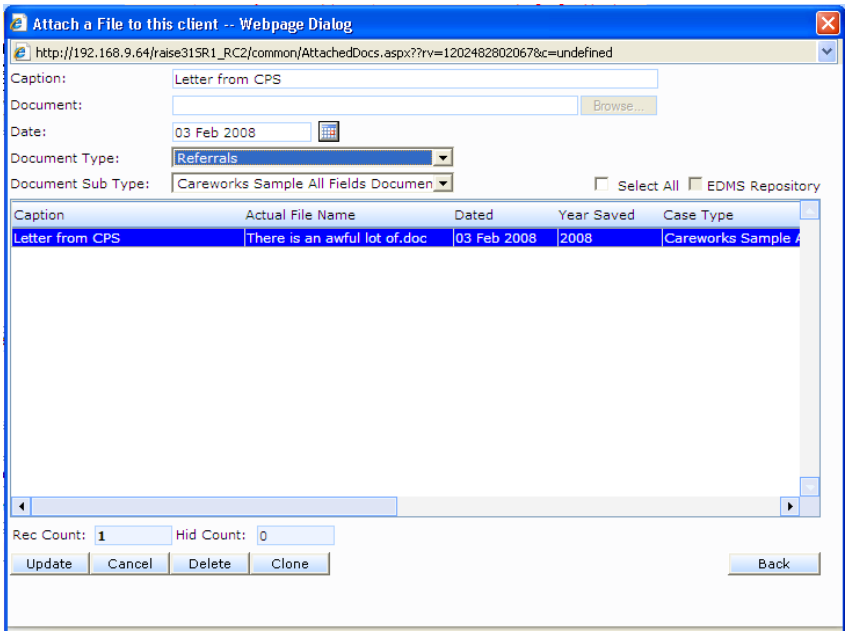


The icon allows you to attach any electronic documents related to the person:



The icon allows you record any required consents:

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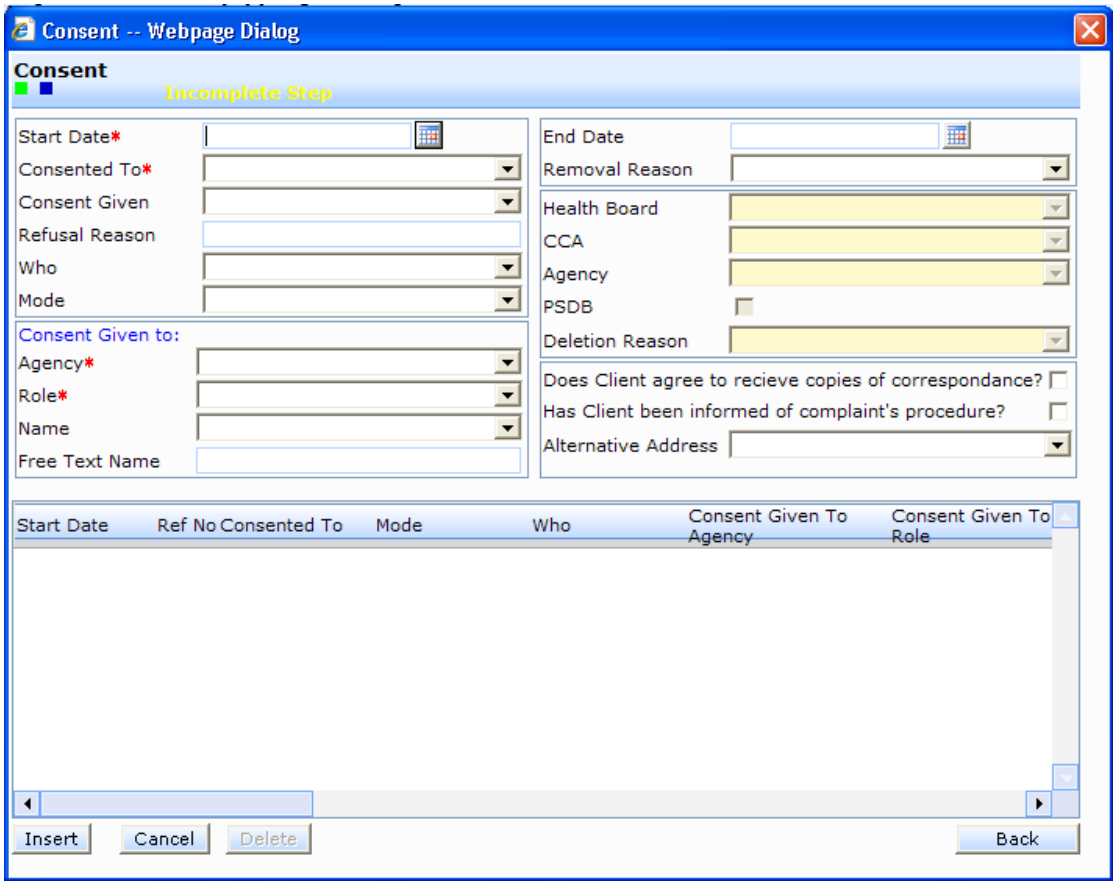

Referral Closure

Referral Closure is a three step process.

Step One:

The worker allocated to a Referral may request its closure. To do this the worker clicks open the light blue workflow button and choose the 'Closure Requested' step:

You then click **Go** and it brings you back to the screen. In the Current Action box fill in an Action Date and then choose a Closure Reason:

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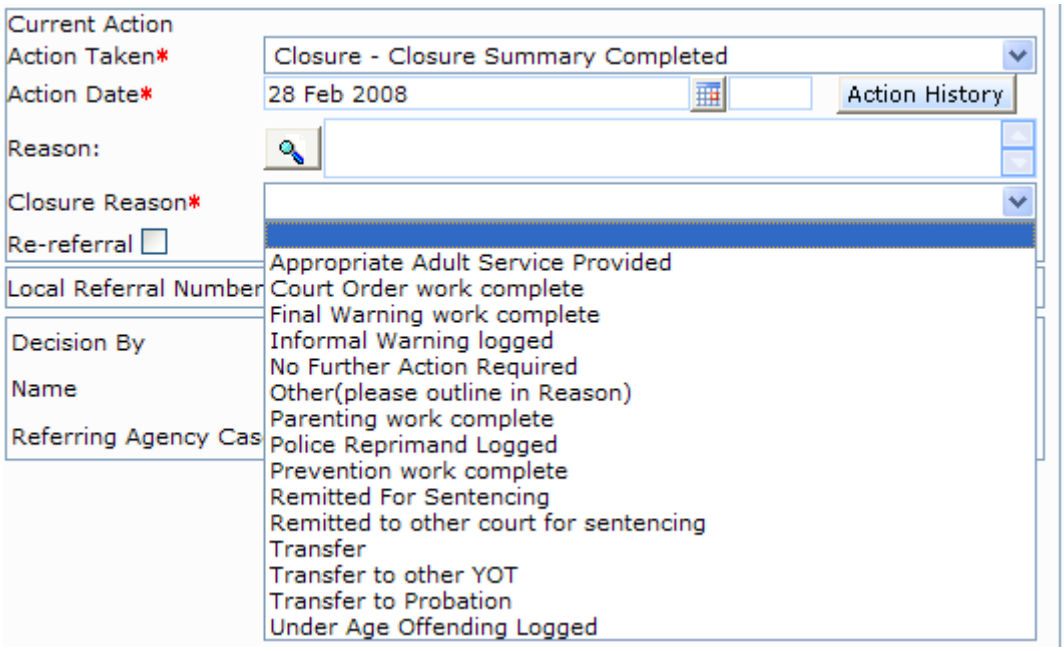
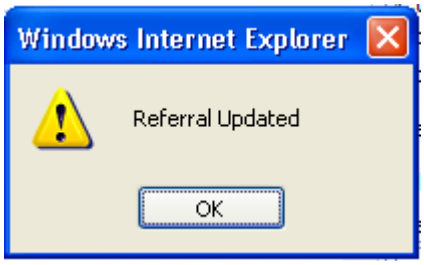


Click on Update , the following message is displayed:

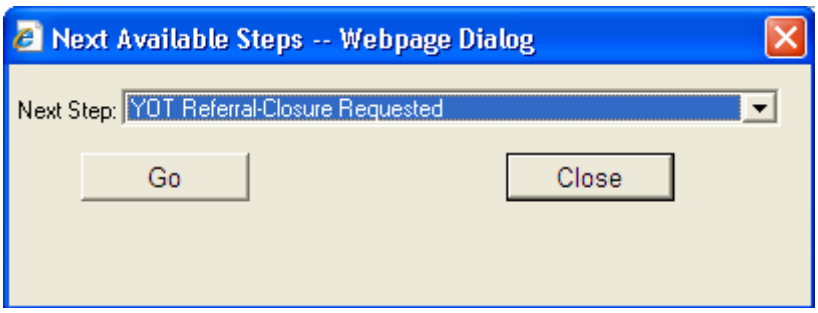


The Closure Request will not proceed if there is

- An active Secondary Allocation

Step Two

Once this step is complete you will be presented with the workflow again and this time only one step:



Clicking On Go will bring you back to the screen where you fill in the Action date and click on Update. You will be prompted to confirm closure:

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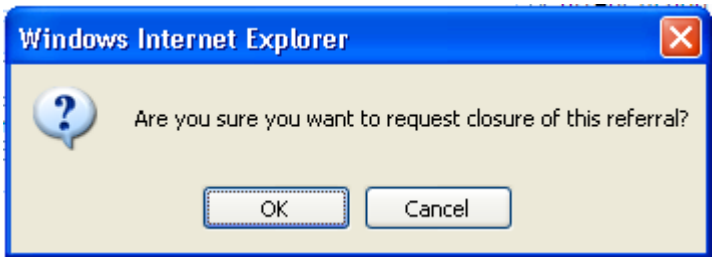
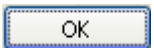
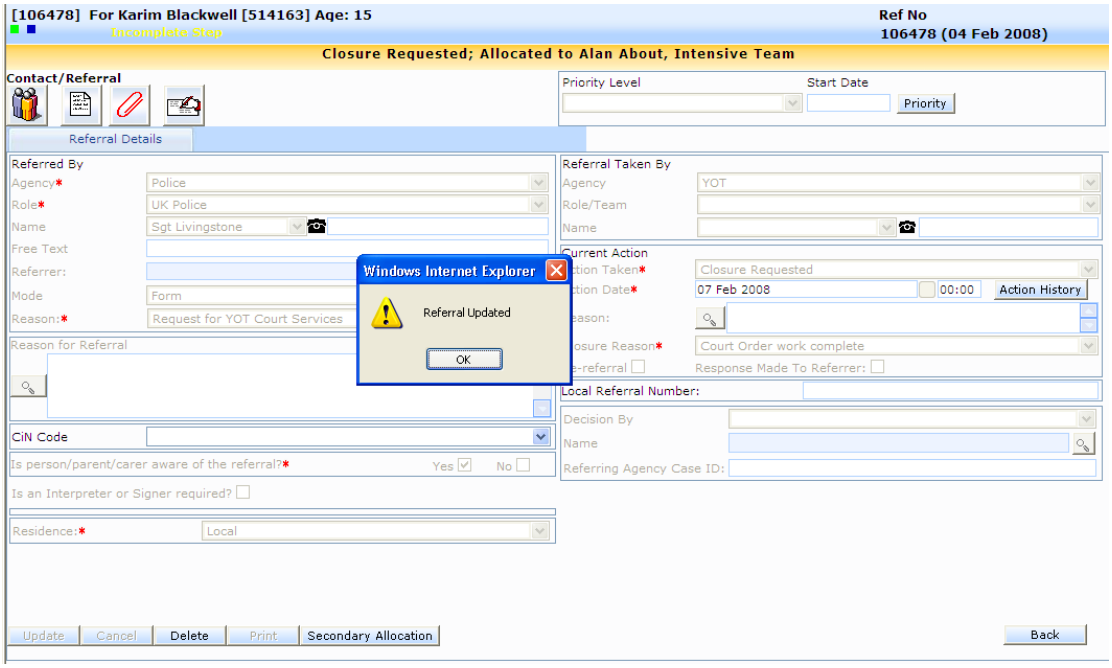
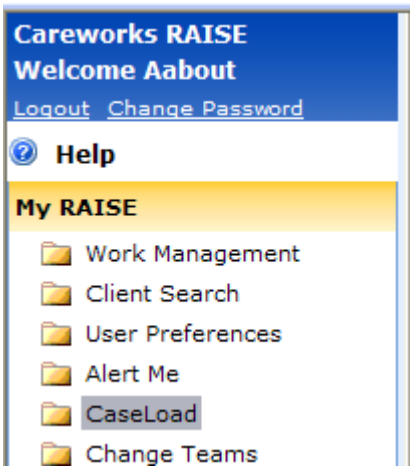


Clicking on  will bring you confirmation of the closure and the referral will be greyed out:

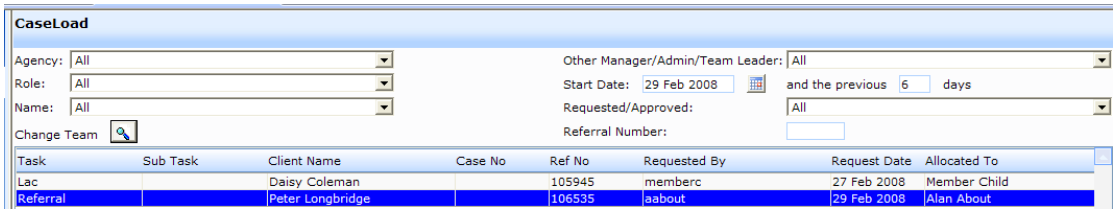


Step Three – Approval or Rejection of a Closure Request.

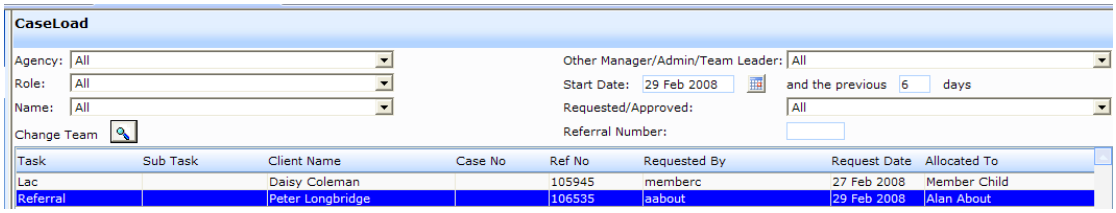
As a team manager you will have access to the Caseload module:



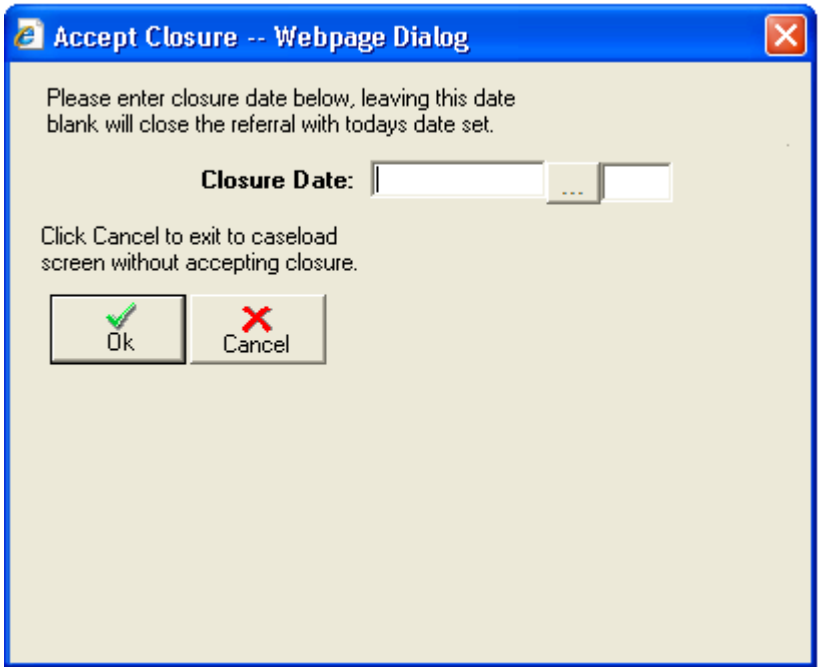
Clicking on caseload will open up the screen:


CaseLoad
Agency: All
Role: All
Name: All
Change Team
Other Manager/Admin/Team Leader: All
Start Date: 29 Feb 2008
and the previous 6 days
Requested/Approved: All
Referral Number:
Task Sub Task Client Name Case No Ref No Requested By Request Date Allocated To
Lac Daisy Coleman 105945 memberc 27 Feb 2008 Member Child
Referral Peter Longbridge 106535 aabout 29 Feb 2008 Alan About

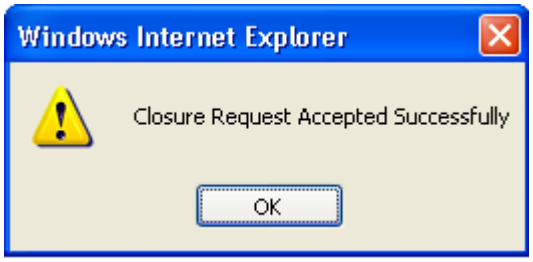
As a manager when you select caseload you will presented with a list of Referrals that are either 'Closure Requested' or 'Fully Closed'. This list can be filtered using the drop down list:


CaseLoad
Agency: All
Role: All
Name: All
Change Team
Other Manager/Admin/Team Leader: All
Start Date: 29 Feb 2008
and the previous 6 days
Requested/Approved: All
Referral Number:
Task Sub Task Client Name Case No Ref No Requested By Request Date Allocated To
Lac Daisy Coleman 105945 memberc 27 Feb 2008 Member Child
Referral Peter Longbridge 106535 aabout 29 Feb 2008 Alan About

To Accept or Reject a Closure, the referral is selected and the appropriate button is chosen. Accepting a closure will bring up the following screen:


Accept Closure -- Webpage Dialog
Please enter closure date below, leaving this date blank will close the referral with todays date set.
Closure Date:
Click Cancel to exit to caseload screen without accepting closure.
Ok
Cancel

Filling the Closure Date and clicking on OK will bring a confirmation message:



Clicking on OK will reveal the Retention screen:

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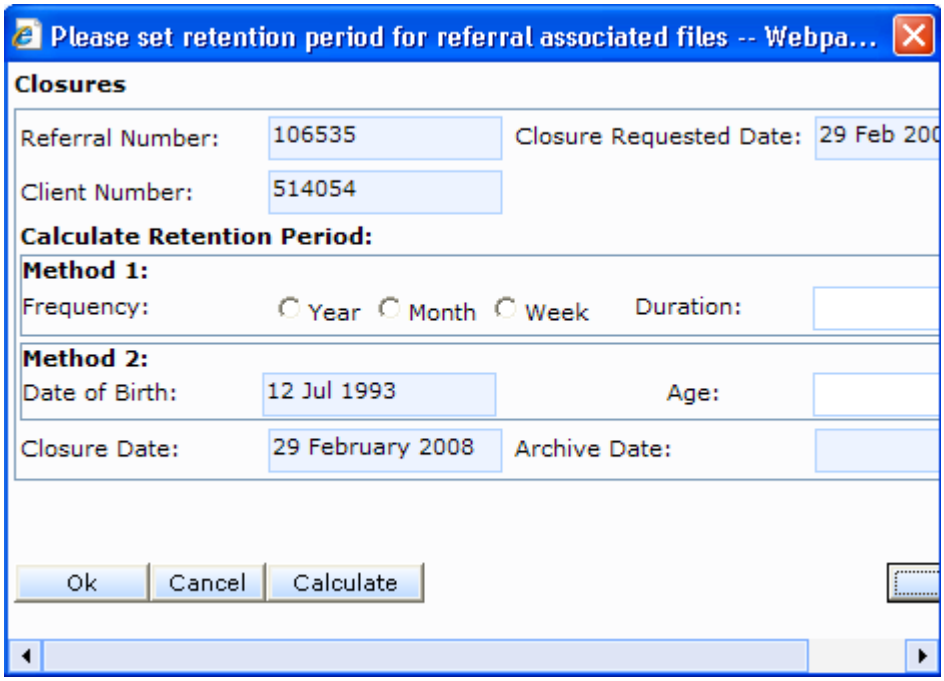
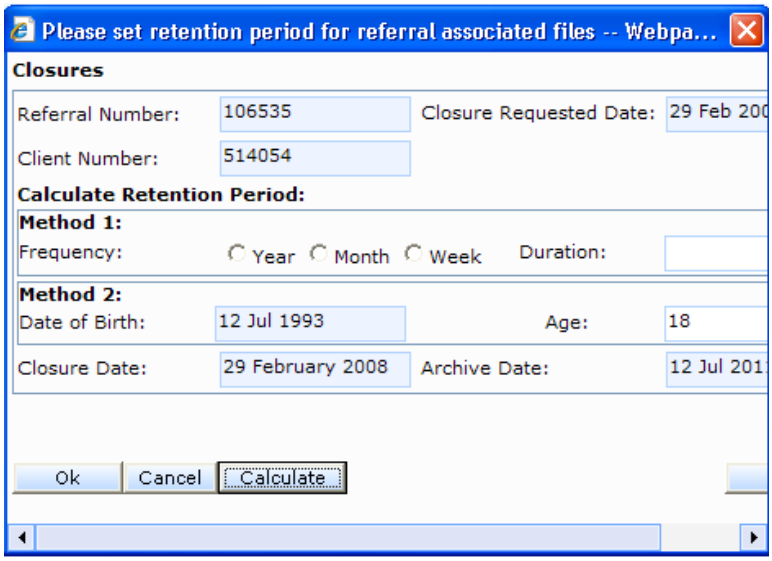


Once you have chosen your method and retention period you click on the

button which fills in the Archive Date:



You will receive a confirmation message:

The referral is now closed.

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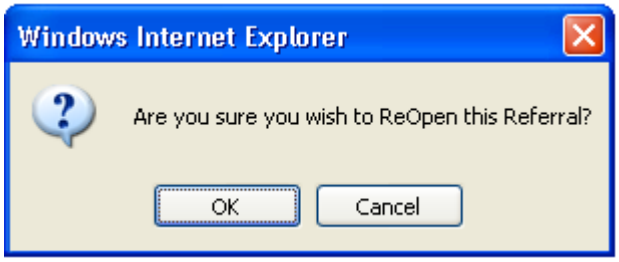
Re-Open a Referral

A referral that is already closed may be re-opened by selecting the Referral in the list of 'Fully Closed' referrals and choosing the ReOpen button. Highlight the Closed Referral and click on Re-open. The following prompt will be displayed:



Clicking on OK will bring up the following:

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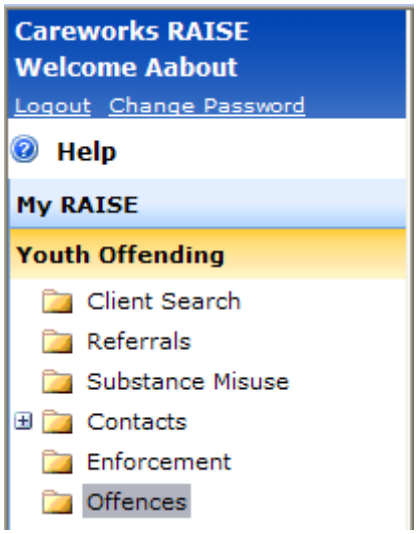
Chapter 6) Offences

Introduction

Once a referral has been created for an offender often the next logical step is to record details of the offence(s) which the young person has been charged with by the police. The offences that are available for selection are those that are required for the Youth Justice Board's Quarterly and Annual Returns.

Entering an Offence(s)

To open the *Offences* screen, click **Dashboards** under *My Raise* on the navigation pane.



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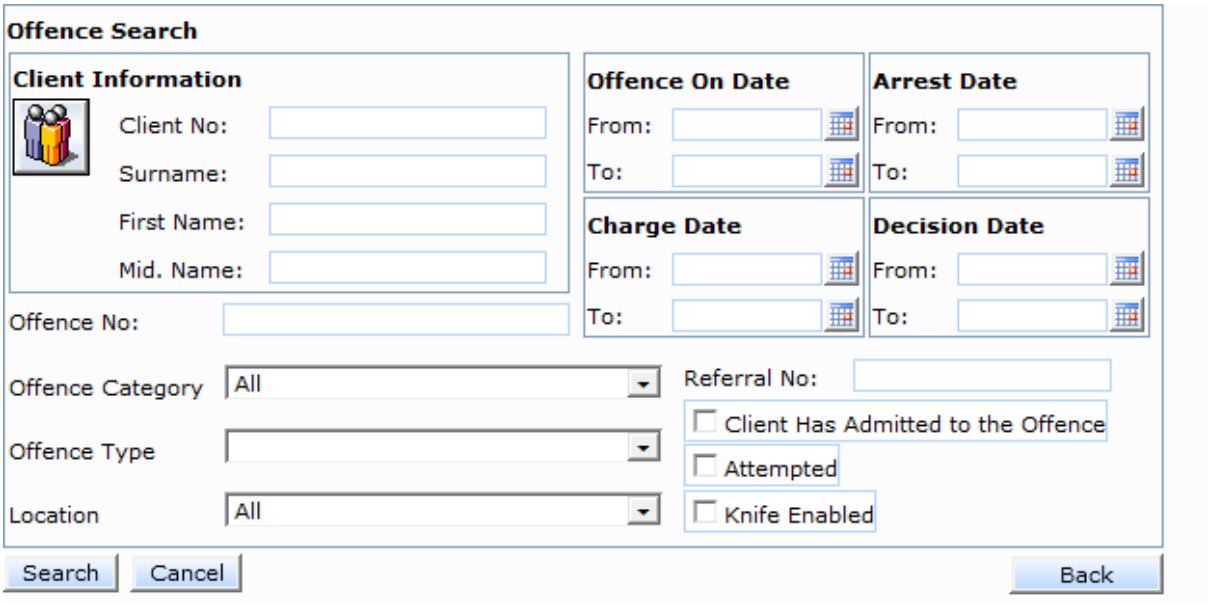
If offences have already been entered for this referral they will be displayed in the grid. If not you will be presented with an empty screen:

Note: There are a number of buttons on this screen. Their functions are as outlined below.

The **Search** button opens up a screen that allows basic searches to be conducted:



The **Print** button allows you to print off offences:

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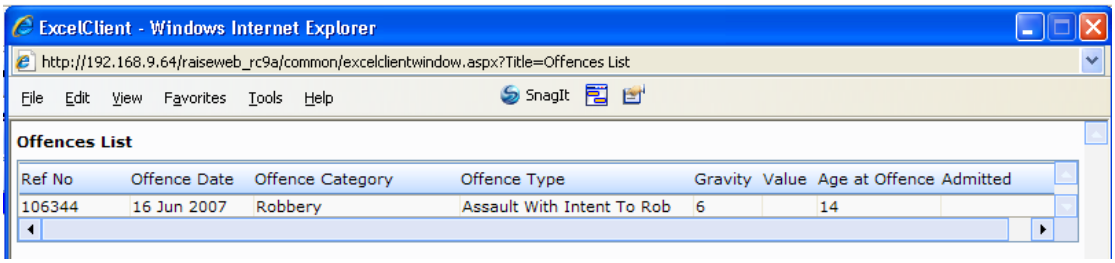
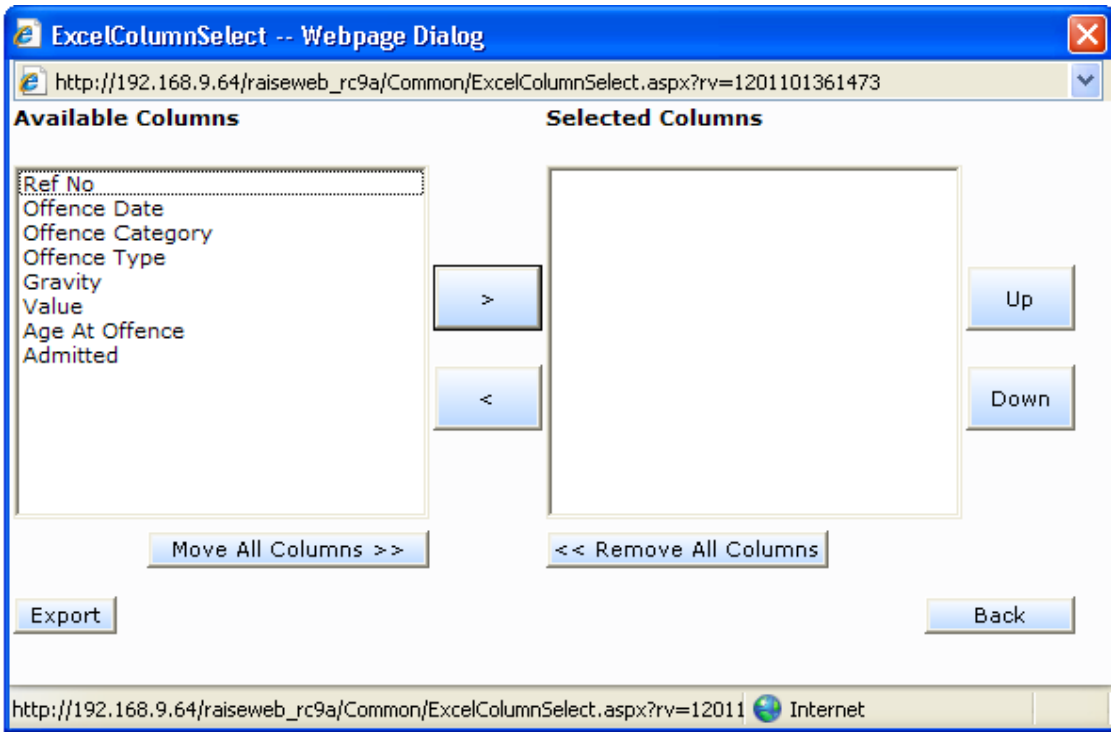
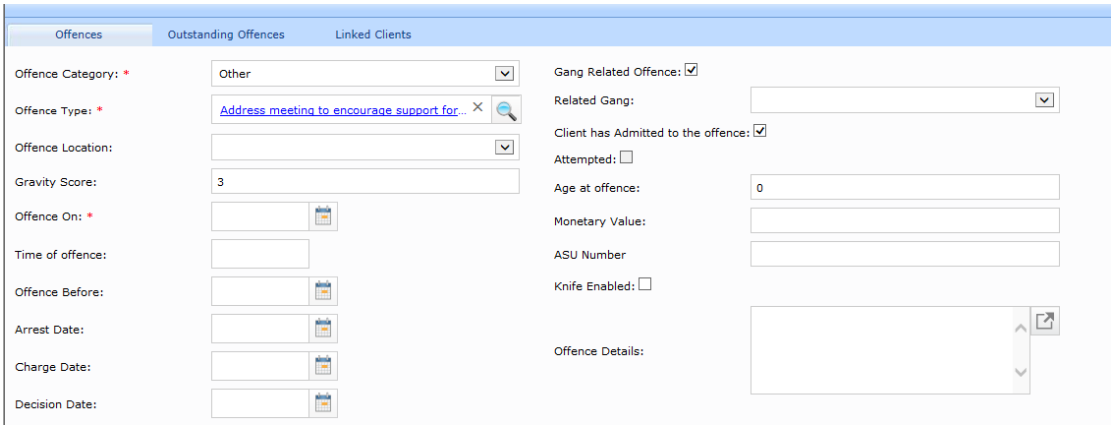


The **Excel** button allows you choose details of offences and export to Excel:

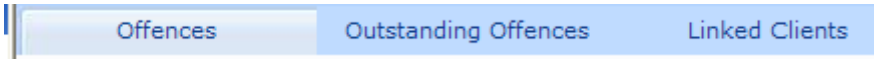


If you select the **Show All** check box, you will see all the young person's offences and not just the ones related to the particular referral.

To add an offence you click initially on the **Insert** button. The following screen is displayed:



At the top of the screen, there are three distinct tabs named **Offences**, **Outstanding Offences** and **Linked Clients**:



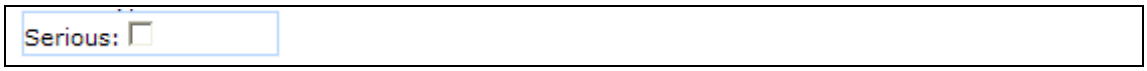
The **Offences** tab allows for the insertion of new offences and the details associated with these offences. It also allows any existing offences to be selected, viewed and amended if necessary. To add an offence do the following:

1. Choose one of the following offence categories:
   - Arson
   - Breach of Bail
   - Breach of Conditional Discharge
   - Breach of Statutory Order
   - Criminal Damage
   - Death or Injury by Dangerous Driving
   - Domestic Burglary
   - Drugs
   - Fraud and Forgery
   - Motoring Offences
   - Non Domestic Burglary
   - Other
   - Public Order
   - Racially Aggravated
   - Robbery
   - Sexual Offences
   - Theft and Handling Stolen Goods
   - Vehicle Theft/ Unauthorised Taking
   - Violence Against the Person — threatening with an article, with a blade or point or offensive weapon in public (Gravity Score =3) Threatening with an article, with a blade or point or offensive weapon on school premises (Gravity Score = 3) Map to YJB Offence Type 'Violence Against the Person'
   - Violence Against the Person — Manslaughter
   - Violence Against the Person — Other

2. You then choose the Offence Type within that category.

3. If required you can indicate that this is a gang offence by ticking the *Gang Related Offence* box:

Note: If within the type of offence you choose 'Other/Unspecified' then you will see the screen change and an additional box appear:



This enables you to classify the offence as serious according to Appendix G: Offences, covered by the 'Serious Crime Shortcut' onto ISSP in the YJB counting Rules 2007-08.

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4. Enter the date and time of the offence in the *Offence On* and *Time of Offence* fields.

Note: The *Offence Before* box is used when the police are unsure of the exact date of the offence but know it was before a specific date:

5. Enter the *Arrest Date.*

Note: This date is used to calculate the age of the young person for the YJB Returns. In the absence of this date, CareDirector Youth takes the offence date.

6. Enter the *Charge Date*.

Note: The *Decision Date* is one that is used in two situations:

1. For Police Reprimands or Final Warnings as in these circumstances a young person is not charged.

2. For breach offences where the date represents when the decision to breach was taken.

7. You may record that the client has admitted the offence using the *Client has Admitted to the offence* check box.

Note: For Police Reprimands and Final Warnings the Client admitted tick box should be ticked as these pre-court outcomes can only be given if the person admits the offence(s).

Note: The *Attempted* check box is selected based on the selected *Offence Type*.

8. The *Age at Offence* will be calculated from the *Arrest Date* and the young person's date of birth.

9. If any compensation may be required then you can enter the *Monetary Value* if necessary.

10. The Administrative Support Unit (ASU) Number is the local number given by the Police and can be entered if required.

11. Enter any additional information about the offence(s) can in the *Offence Details* field.

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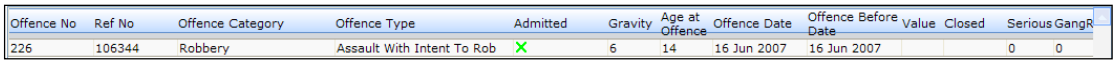
12. When all necessary details are entered, click on the *Insert* button you will receive the following confirmation message:

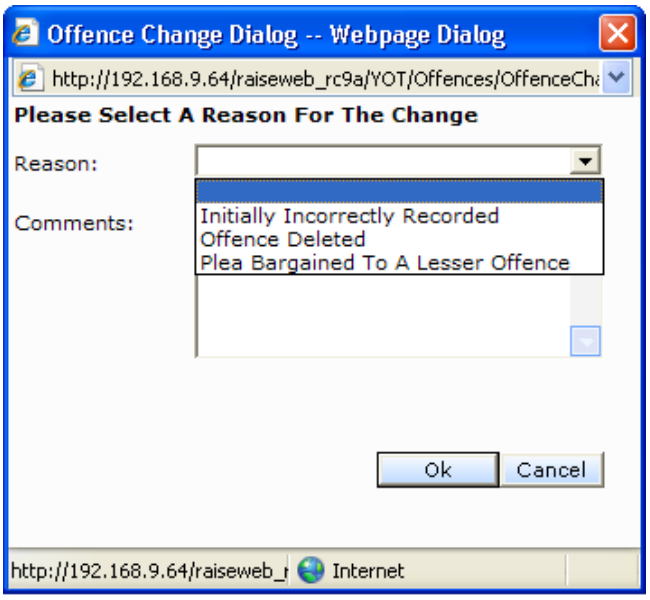
You will then see the offence in the bottom box:



Offence No	Ref No	Offence Category	Offence Type	Admitted	Gravity	Age at Offence	Offence Date	Offence Before Date	Value	Closed	Serious	GangR
226	106344	Robbery	Assault With Intent To Rob	X	6	14	16 Jun 2007	16 Jun 2007			0	0

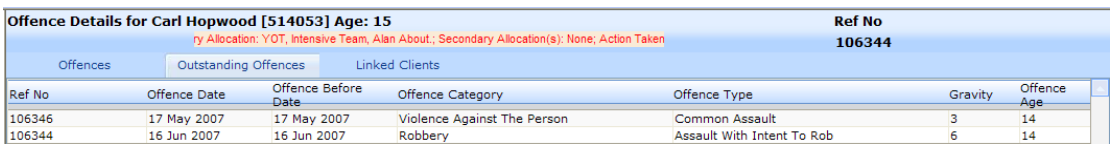
At any time by clicking the offence back into the top box you can make any necessary amendments including deletion and then click the **Update** button.

Note: If you delete an offence you will be asked to enter details in the following screen:



Outstanding Offences

This tab is a presentation of all outstanding offences for the young person, regardless of the referral against which they have been logged:



Offence Details for Carl Hopwood [514053] Age: 15 **Ref No 106344**

ry Allocation: YOT, Intensive Team, Alan About.; Secondary Allocation(s): None; Action Taken

Offences | Outstanding Offences | Linked Clients

Ref No	Offence Date	Offence Before Date	Offence Category	Offence Type	Gravity	Offence Age
106346	17 May 2007	17 May 2007	Violence Against The Person	Common Assault	3	14
106344	16 Jun 2007	16 Jun 2007	Robbery	Assault With Intent To Rob	6	14

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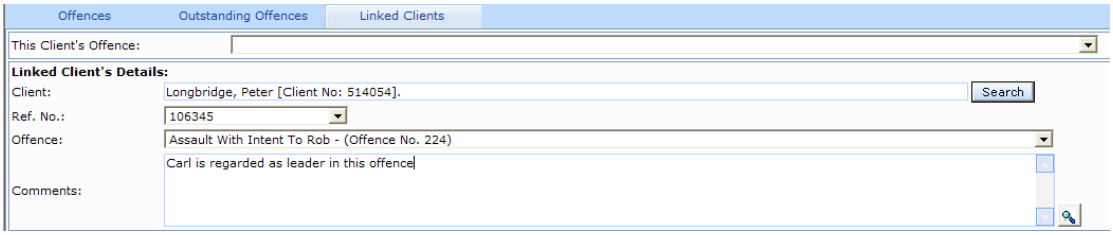
Linked Clients

This tab is allows an association to be made between this client and this offence and another client and their offence:

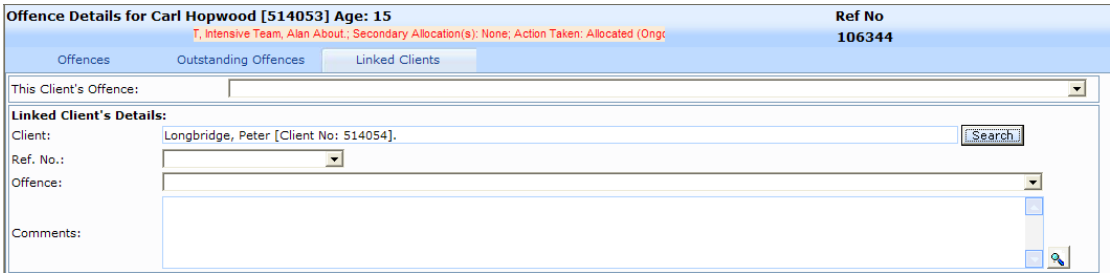


To create the association you first identify the primary client's offence even if you have already identified it on the offences tab:

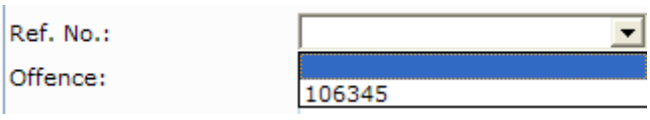
You then identify the linked client by clicking on the

button. In the search screen that appears you type in your search details. You click on the Search button on the bottom right hand side:

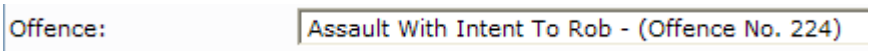
Double clicking on this name will put the name into the linked client's field:

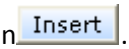


You then pick up the relevant referral:



Once this is entered you can choose the Associated Offence:



Any comments made can be added at this stage before clicking on 

. This will enter the Linked Client into the bottom field. This procedure can be repeated if there are further linked clients.

Note: Offences can be linked even if they are not the same offence type. For example you may want to link someone who has committed a theft with someone who has received stolen goods.

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Chapter 7) Hearing details

Introduction

This module allows you to record and track the progress of a young person through the courts with their related offence(s). In addition you can record who was present in court and the decisions, such as Remand and Bail, made at each individual court appearance. The routes taken by a young person can be very varied and consequently you need to accurately record the movements and outcomes of each hearing.

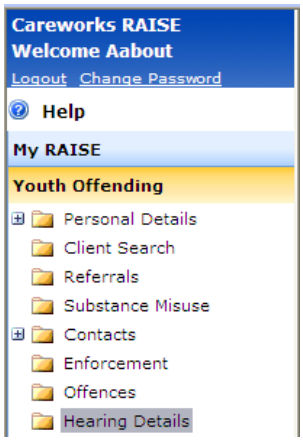
Function

Creating a Court Hearing

In our example there are four hearings which deal with two offences. The first is a remand and bail hearing where the young person appears and the case with the two offences is simply adjourned for a week. At the second adjournment hearing they take the pleas and the young person pleads guilty to one offence and not guilty to the other. The court imposes a sentence of a fine on the one offence but adjourns the other for two weeks to a trial. At the third hearing, which is a trial, the young person is found guilty and the case is adjourned for two week with a request for a Pre-Sentence Report. At the final hearing which is the second sentence hearing the young person is sentenced to a Referral Order.

Hearing 1 – A Remand and Bail Hearing

You select the Hearing Details module by clicking on hearing details in the left-hand menu:



You will be presented with the Hearing Details screen:

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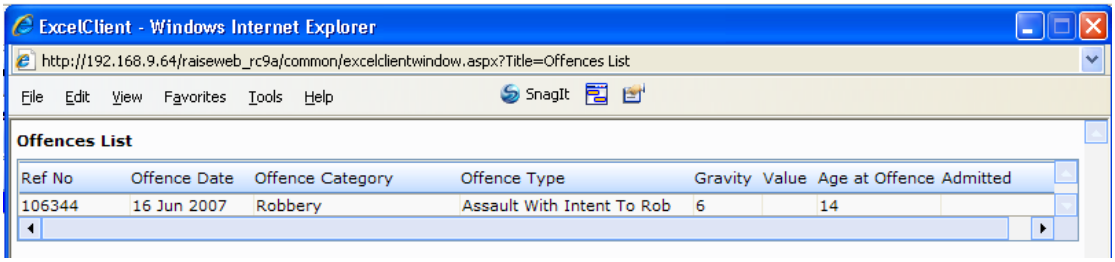
Note: There are a number of buttons on this screen. Their functions are as outlined below.

The Search button opens up a screen that allows basic searches to be conducted:

The Print button allows you to print off hearings:



The Excel button allows you choose details of hearings and export to Excel:

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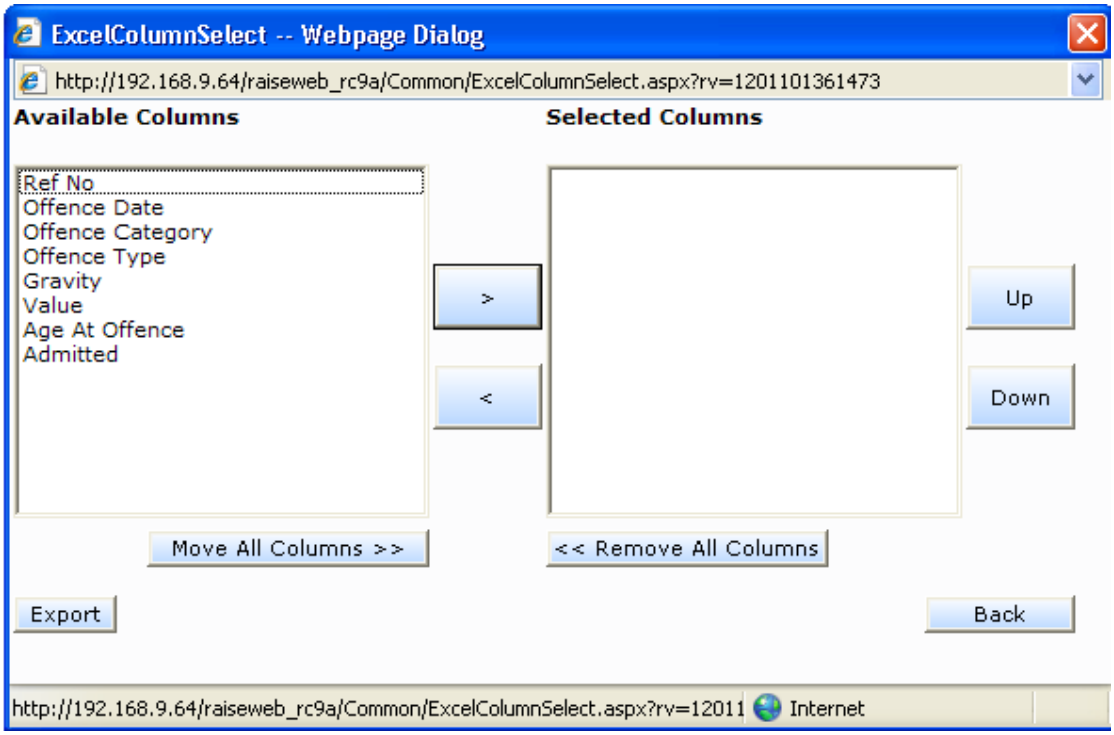
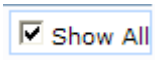
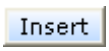
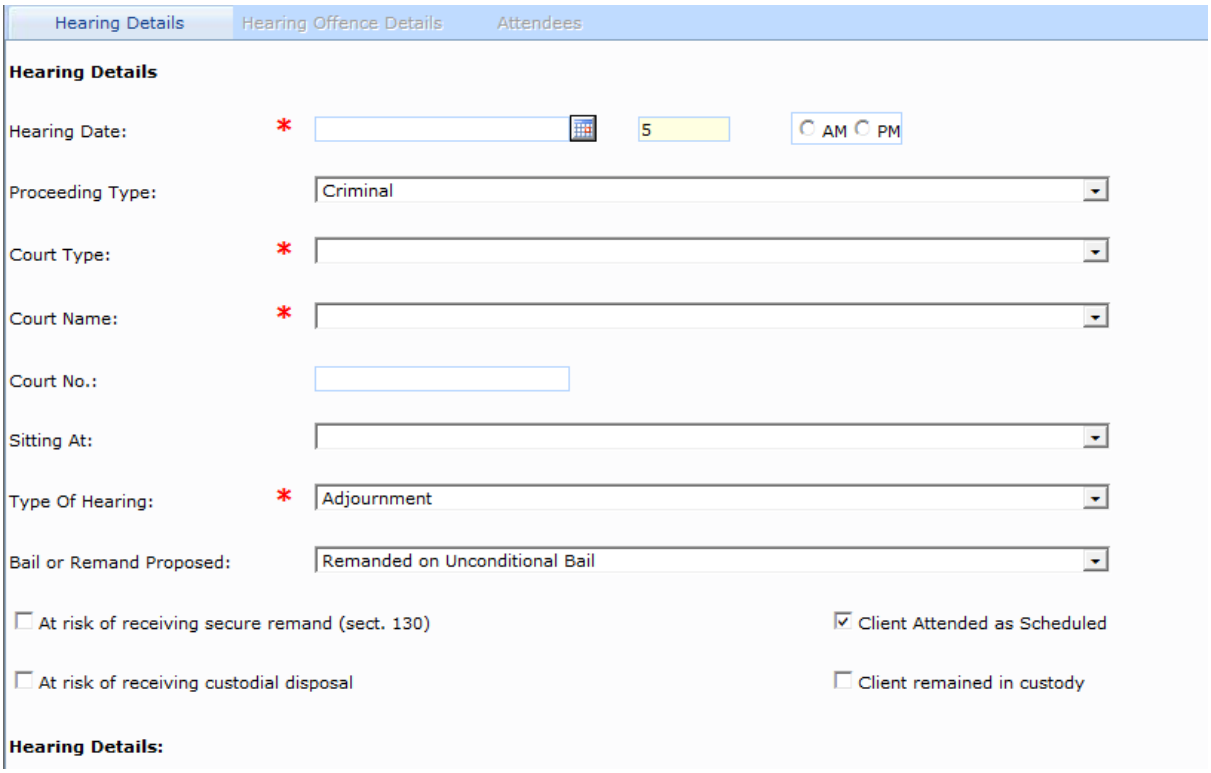


If you tick the  box then you will see all the young person's hearings and not just the ones related to the particular referral.

You click on the Insert button  to create the new hearing:



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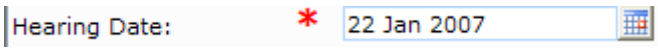
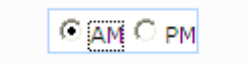
Fill in the Hearing Date by typing in the date in the agreed formats (07 Jan 2007, 22/01/07 or 22.01.07) or by clicking on the calendar:



Next to that you will see a number in a box:

This signifies that this is the first hearing in the sequence of hearings that may arise.

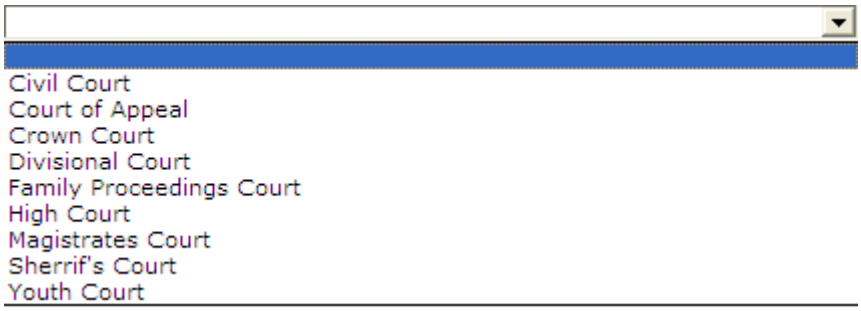
You are also able to record whether it is a morning or afternoon hearing:



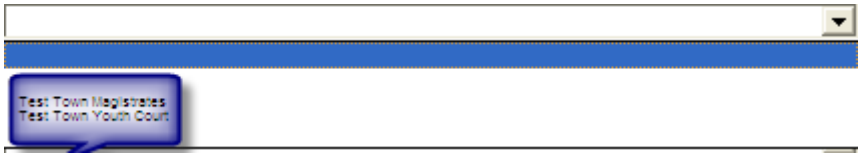
In the next field CareDirector Youth will always default the Proceeding Type to Criminal:

Note: It will be necessary to change this to Civil if you are recording an Anti-Social Behaviour Order that was given in a Civil Hearing.

You then choose your Court Type:



You enter the name of the Court:



If necessary you can enter the number of the Court:

The next box will default to the Court Name and you will only change it if the hearing is at a different location:

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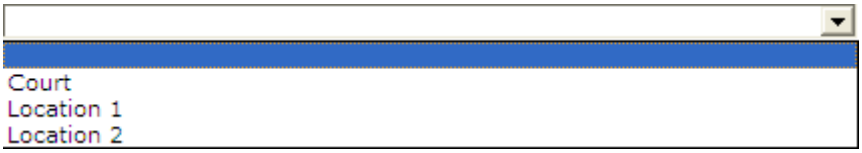
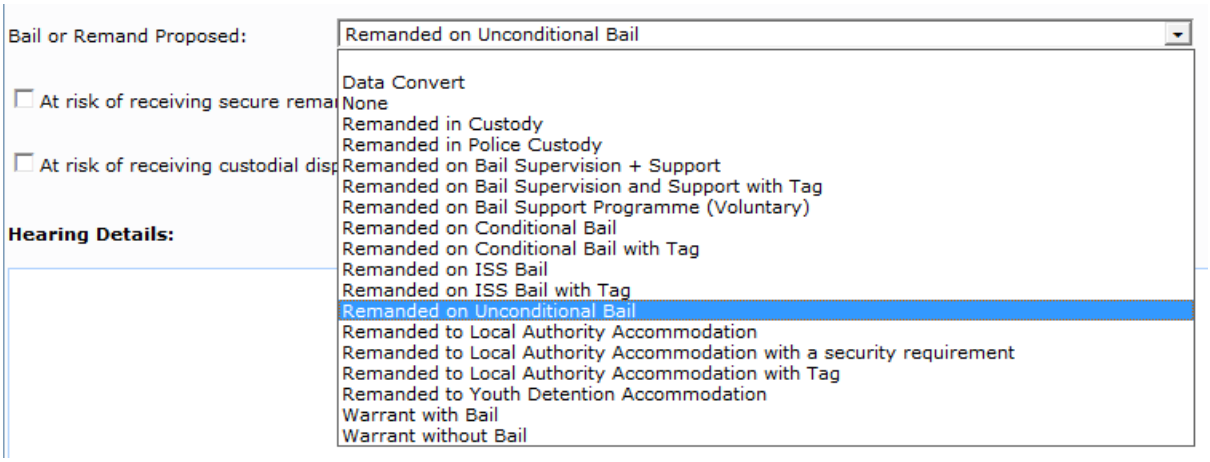


Note: In a number of counties the Youth Bench may sit at different locations.

Record the Type of Hearing:

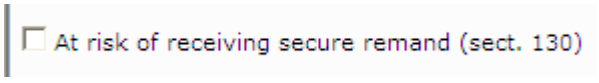
Bail or Remand proposed:

Here you can record the type of bail or remand proposed for the the young person.


Bail or Remand Proposed:
Remanded on Unconditional Bail
At risk of receiving secure rema
At risk of receiving custodial disp
Hearing Details:
Data Convert
None
Remanded in Custody
Remanded in Police Custody
Remanded on Bail Supervision + Support
Remanded on Bail Supervision and Support with Tag
Remanded on Bail Support Programme (Voluntary)
Remanded on Conditional Bail
Remanded on Conditional Bail with Tag
Remanded on ISS Bail
Remanded on ISS Bail with Tag
Remanded on Unconditional Bail
Remanded to Local Authority Accommodation
Remanded to Local Authority Accommodation with a security requirement
Remanded to Local Authority Accommodation with Tag
Remanded to Youth Detention Accommodation
Warrant with Bail
Warrant without Bail

The next four tick boxes each have a specific purpose and you will need to tick them if they are relevant to the hearing you are currently entering.

The first of these relates to the possibility that the young person may receive a Secure Remand at the hearing that is being entered. This is required for CareDirector Youth to calculate the ISSP Route C which partly involves the young person being at risk of receiving such a remand.



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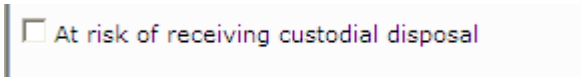
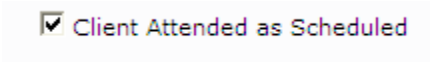
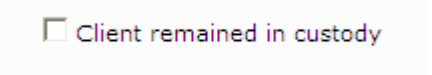
The second of these again relates to ISSP but this time it is in connection with Route D. This is where a young person has been released from custody within the last six months and at this particular hearing or a future hearing could be sentenced again to custody:



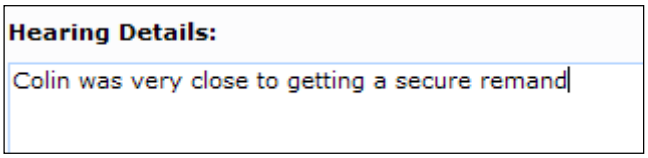
The third will always default to being ticked as CareDirector Youth assumes the young person will attend court. If they do not then you **un-tick** the box:



The final one relates to what are termed 'Technical Remands in Custody'. This is where a young person is already remanded or has been sentenced to custody and appears in the same or another court on further offences. At that hearing the Youth Bench may give a Conditional Bail or a similar status as they know the young person is already in custody. If this is the case you would tick this box:



Within Hearing Details you enter any details that are necessary:



Note: If you make a mistake then the cancel button Cancel will clear the screen for re-entry. If you wish to delete the hearing the delete button Delete will delete the hearing. However before the actual hearing can be deleted any offences or outcomes attached to that hearing or subsequent hearings will need to be removed.

Once completed you click on the Insert button Insert and a confirmation message will appear:

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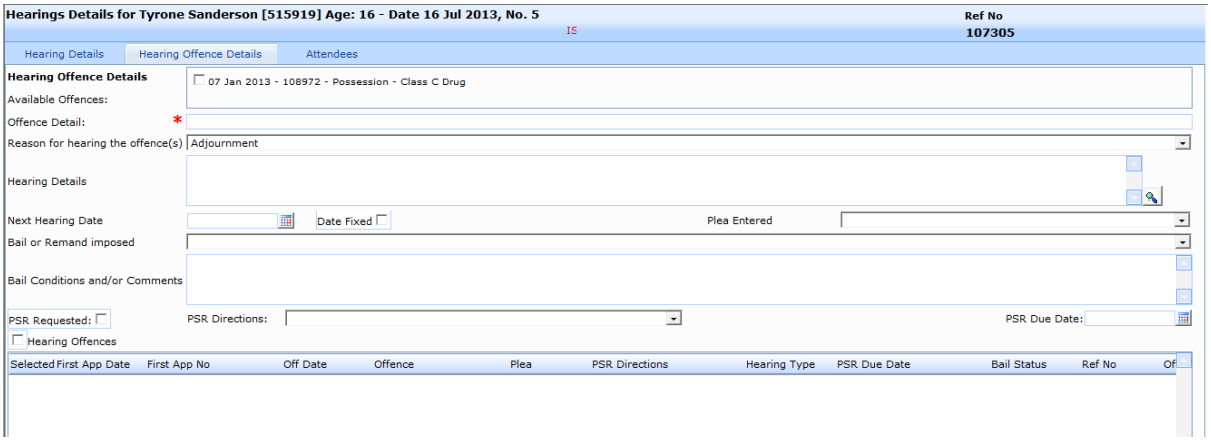
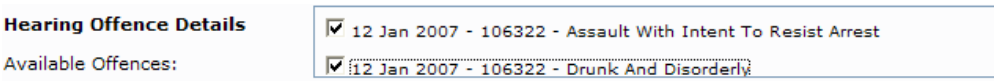
Entering the First Hearing's Offence Details

Once acknowledged CareDirector Youth will automatically open the Hearing Offence Details screen, as it requires you to input the offences that the young person is appearing for and other outcomes that arise from the hearing:

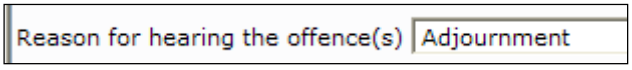


Your first action in the Available Offences box is to tick the two offences that the young person is appearing for at that hearing.

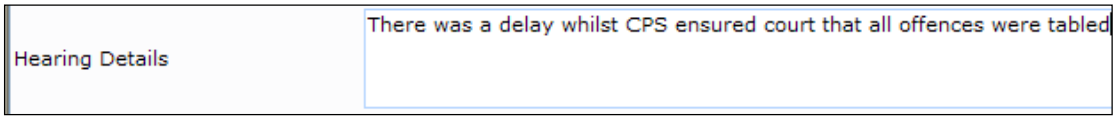

Hearing Offence Details
Available Offences:
12 Jan 2007 - 106322 - Assault With Intent To Resist Arrest
12 Jan 2007 - 106322 - Drunk And Disorderly

Note: This box is made up of all the offences connected to that young person and which have not yet had a substantive outcome recorded against them. It is not referral specific but will take offences from all of the young person's referrals which have no substantive outcome.

If the reason for hearing offences is not correct for the particular offence you are dealing with then you re-select the type of hearing. In our example both offences have been adjourned to another date:



Any further hearing details related to the offences can be added here:



The Next Hearing Date can then be entered:

Bail or Remand Imposed:

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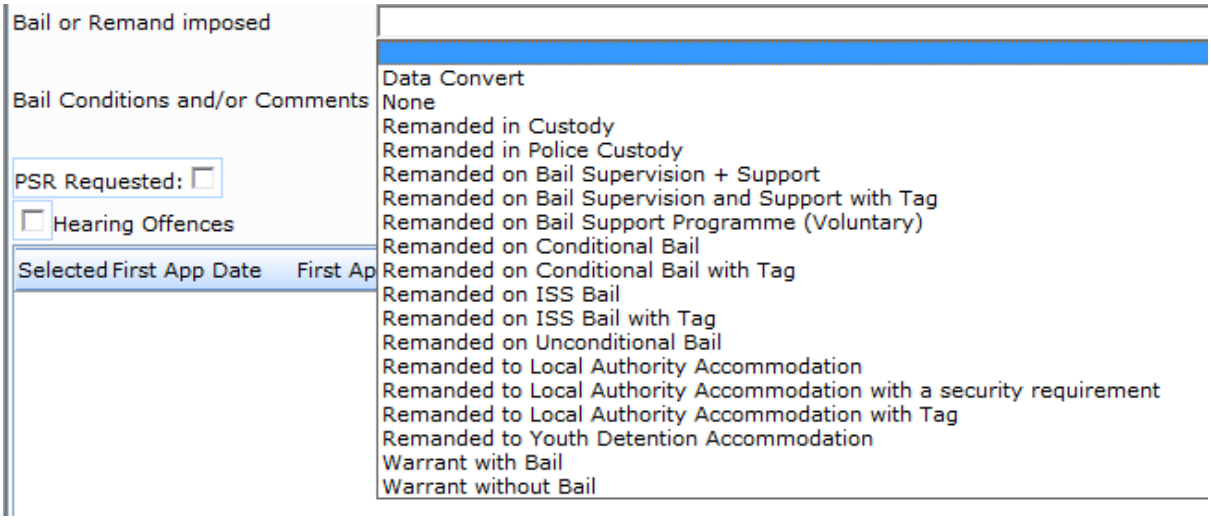
Records if Bail or remand has been imposed.


Bail or Remand imposed
Bail Conditions and/or Comments
PSR Requested:
Hearing Offences
Selected First App Date
First Ap
Data Convert
None
Remanded in Custody
Remanded in Police Custody
Remanded on Bail Supervision + Support
Remanded on Bail Supervision and Support with Tag
Remanded on Bail Support Programme (Voluntary)
Remanded on Conditional Bail
Remanded on Conditional Bail with Tag
Remanded on ISS Bail
Remanded on ISS Bail with Tag
Remanded on Unconditional Bail
Remanded to Local Authority Accommodation
Remanded to Local Authority Accommodation with a security requirement
Remanded to Local Authority Accommodation with Tag
Remanded to Youth Detention Accommodation
Warrant with Bail
Warrant without Bail

If *Remanded to Youth Detention Accommodation* is recorded, the new remand outcome is mapped to YJB Remand Decision Type '*Youth Detention Accommodation'*.

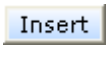
CareDirector Youth will default Plea Entered to Not taken unless you alter the entry. In this example the plea was not taken at the remand and bail hearing:

Note: It is important that you enter the plea at the hearing when it is taken.

The bail or remand imposed is then entered along with any comments relating to those conditions:

Bail or Remand imposed
Remanded on Conditional Bail
Bail Conditions and/or Comments
Daily Reporting to Police Station
Must not go into Test Town Shopping Mall

At this hearing the court has adjourned to another date but have not requested a Pre-Sentence Report:

Once this completed you click on Insert button 

and the entry is made into the bottom field following a confirmation message:

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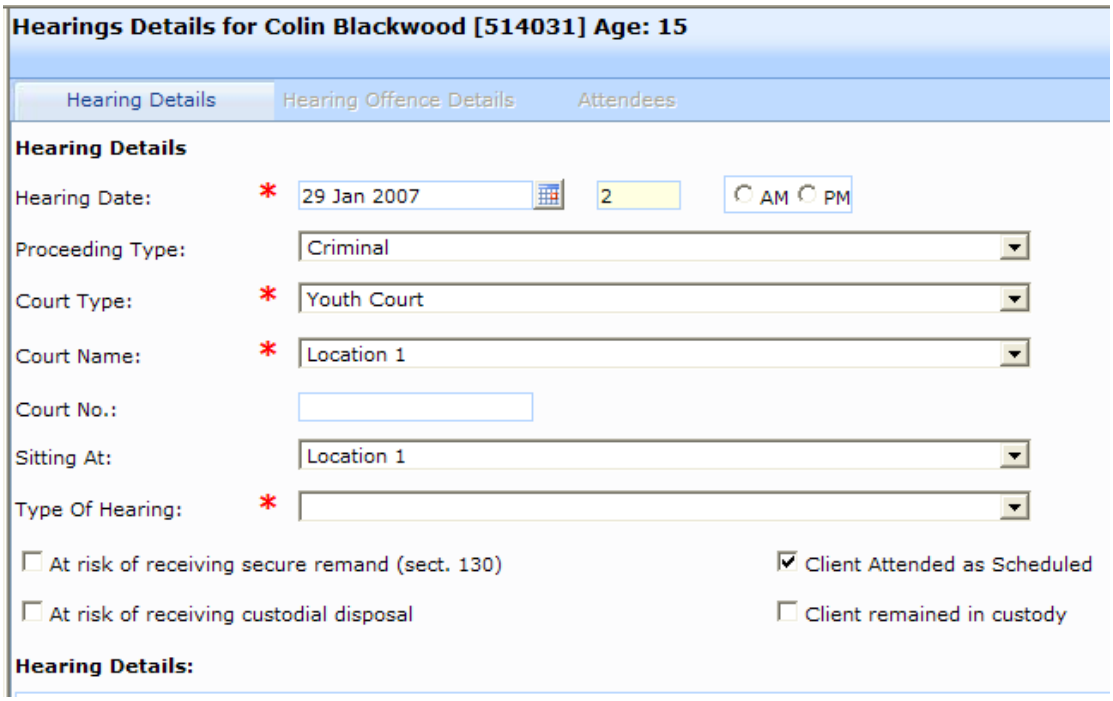
You then hit the Back button Back.

The hearing becomes a line on the hearing details grid:

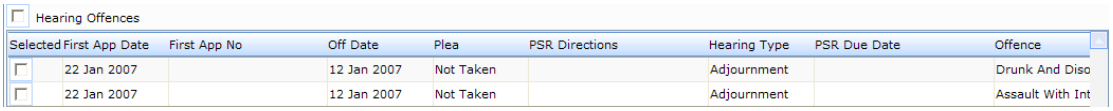
Hearing 2 – The Adjournment/Sentence Hearing

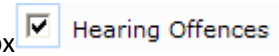
To insert the next hearing you click on Insert and CareDirector Youth will automatically default to the next hearing date that you had entered previously in Appearance Offence Details.



You will then need to enter, the Type of Hearing and any Hearing Details before pressing the Insert button.

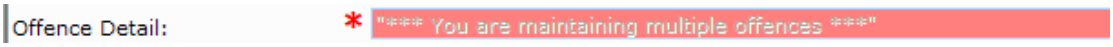
You will be taken to the Appearances Offences Details where you will see the offences in the bottom box;


Hearing Offences
Selected First App Date First App No Off Date Plea PSR Directions Hearing Type PSR Due Date Offence
22 Jan 2007 12 Jan 2007 Not Taken Adjournment Drunk And Diso
22 Jan 2007 12 Jan 2007 Not Taken Adjournment Assault With Int

The next stage depends entirely on what happens in court. If for example all offences are to be dealt with together at a future hearing you will tick the box 

.

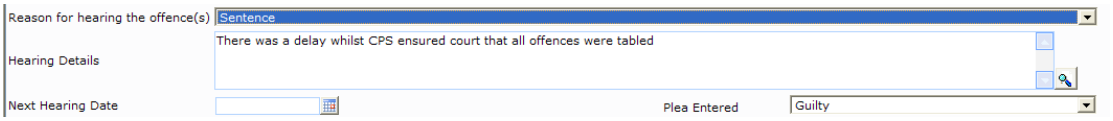
This then brings all the offences forward and you will recognise this by the following message in the Offence Detail:



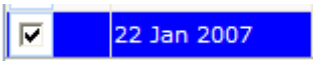
However in our example the young person was pleading guilty to one offence and not guilty to the other, therefore each offence would be dealt with separately. You will tick the tick box to the left of the first offence:

And you will see the chosen offence appear in Offence Details:

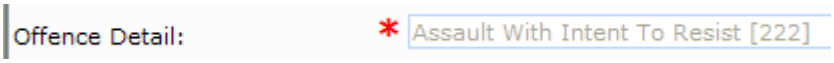
The first offence where the young person has pleaded guilty and the court have imposed a sentence of a fine you will fill in as follows and then click on the Update button:



You will tick the tick box to the left of the second offence:



You will see the chosen offence appear in Offence Details:



For the second offence the young person has pleaded not guilty and the court has adjourned for two weeks for a trial. This will appear as follows:

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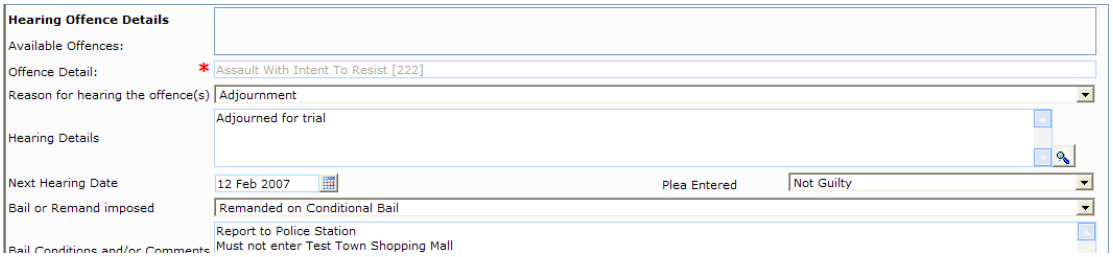


Note: If for any reason an offence has to be deleted from the hearing it is not sufficient to simply highlight it but you must also put a tick in the selected box.

You then click on Back INSERT and you will be returned to the grid where you see three grid lines:

Hearing List for Colin Blackwood [514031] Age: 15
Ref No
106322
Distinct List
Ref No | Hearing Date | Hearing No | Iterations | Appearance Hearing Type | Reason for Hearing Offence | Hearing Text | Next
106322 | 22 Jan 2007 | 1 | 3 | Remand/Bail Hearing | Adjournment | There was a delay whilst CPS ensured court that all offences were tabled | 29 Ja
106322 | 29 Jan 2007 | 2 | 1 | Adjournment | Adjournment | Adjourned for trial | 12 Fe
106322 | 29 Jan 2007 | 2 | 1 | Adjournment | Sentence

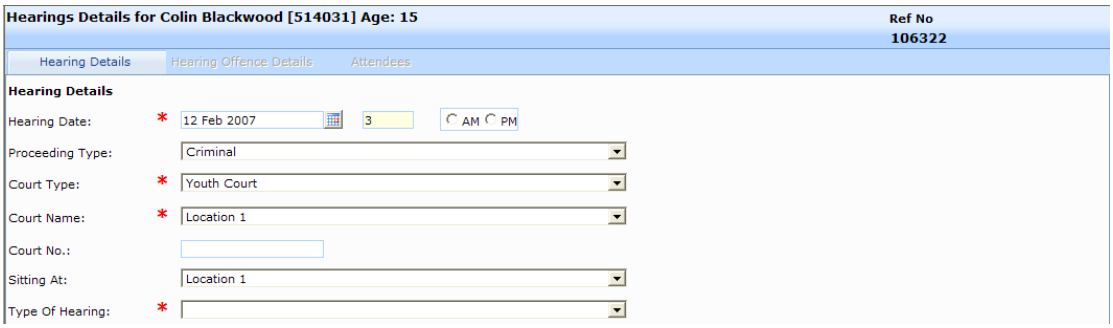
The Adjournment Status of the second two lines will need to be changed to Sentence as this status is required to put the outcome of the fine against the first offence. You re-open one of the two and change the Hearing Type from Adjournment to Sentence and click on Update. Following the confirmation message and clicking on Back will now show you the following screen:

Hearing List for Colin Blackwood [514031] Age: 15
Ref No
106322
Distinct List
Ref No | Hearing Date | Hearing No | Iterations | Appearance Hearing Type | Reason for Hearing Offence | Hearing Text | Next
106322 | 22 Jan 2007 | 1 | 3 | Remand/Bail Hearing | Adjournment | There was a delay whilst CPS ensured court that all offences were tabled | 29 Ja
106322 | 29 Jan 2007 | 2 | 2 | Sentence | Adjournment | Adjourned for trial | 12 Fe
106322 | 29 Jan 2007 | 2 | 2 | Sentence | Sentence

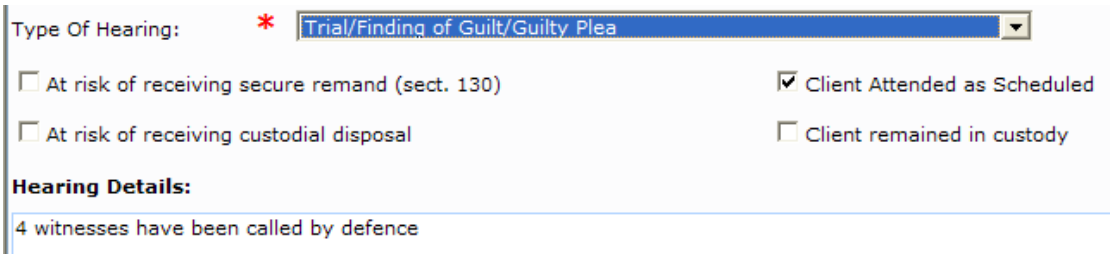
Note: At this stage you would actually record the outcome of the fine. The details will be dealt with in the Outcomes module. This would have the effect of removing the first offence as one that can be used in future hearings.

Hearing 3 – The Trial Hearing

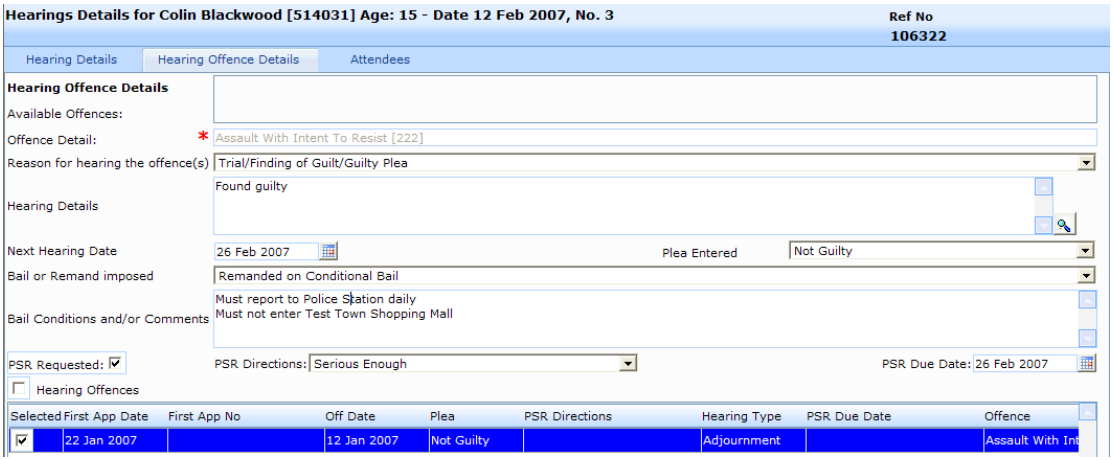
To insert the next hearing you click on Insert and CareDirector Youth will automatically default to the next Hearing Date that had been entered previously in Appearance Offence Details:



You will then need to enter, the Type of Hearing and any Hearing Details before pressing the Insert button:


Type Of Hearing: * Trial/Finding of Guilt/Guilty Plea
At risk of receiving secure remand (sect. 130)
Client Attended as Scheduled
At risk of receiving custodial disposal
Client remained in custody
Hearing Details:
4 witnesses have been called by defence

You will be taken to the Appearances Offences Details where you will see the offence in the bottom box and you select that offence. Complete as follows:


Hearings Details for Colin Blackwood [514031] Age: 15 - Date 12 Feb 2007, No. 3
Ref No
106322
Hearing Details
Hearing Offence Details
Attendees
Hearing Offence Details
Available Offences:
Offence Detail: * Assault With Intent To Resist [222]
Reason for hearing the offence(s) Trial/Finding of Guilt/Guilty Plea
Hearing Details
Found guilty
Next Hearing Date 26 Feb 2007
Plea Entered Not Guilty
Bail or Remand imposed Remanded on Conditional Bail
Bail Conditions and/or Comments
Must report to Police Station daily
Must not enter Test Town Shopping Mall
PSR Requested:
PSR Directions: Serious Enough
PSR Due Date: 26 Feb 2007
Hearing Offences
Selected First App Date First App No Off Date Plea PSR Directions Hearing Type PSR Due Date Offence
22 Jan 2007 12 Jan 2007 Not Guilty Adjournment Assault With Int

When setting a Sentence Date and asking for reports you are required to fill in the following fields:

You will tick the PSR (Pre-Sentence Report) Requested box, choose a value in PSR Directions and fill in a PSR Due Date:

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Note: The values in PSR Directions are as follows:

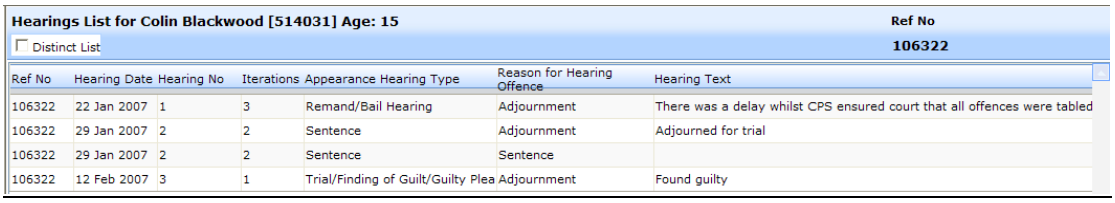
Serious First Tier penalties such as Conditional Discharge or Fine

Serious Enough Community Penalties such as Action Plan or Reparation Order

So Serious Community Penalties/Custody – such as DTO or Supervision Order

Note: The PSR Due Date is normally the same date as the Sentence Date but occasionally there may be an additional Remand Hearing before the actual sentence date.

After you have clicked the update button Update and clicked the back button Back you will be returned to the Hearings List where you now will see four hearings:



Hearings List for Colin Blackwood [514031] Age: 15 — Ref No 106322

Distinct List

Ref No	Hearing Date	Hearing No	Iterations	Appearance Hearing Type	Reason for Hearing Offence	Hearing Text
106322	22 Jan 2007	1	3	Remand/Bail Hearing	Adjournment	There was a delay whilst CPS ensured court that all offences were tabled
106322	29 Jan 2007	2	2	Sentence	Adjournment	Adjourned for trial
106322	29 Jan 2007	2	2	Sentence	Sentence	
106322	12 Feb 2007	3	1	Trial/Finding of Guilt/Guilty Plea	Adjournment	Found guilty

Hearing 4 – The Final Sentence Hearing

To insert the next hearing you click on Insert and CareDirector Youth will automatically default to the next Hearing Date that had been entered previously in Appearance Offence Details:

Hearings Details for Colin Blackwood [514031] Age: 15

Hearing Details | Hearing Offence Details | Attendees

Hearing Details

Hearing Date: * 26 Feb 2007 4 AM PM

Proceeding Type: Criminal

Court Type: * Youth Court

Court Name: * Location 1

Court No.:

Sitting At: Location 1

Type Of Hearing: *

At risk of receiving secure remand (sect. 130)

At risk of receiving custodial disposal

Client Attended as Scheduled

Client remained in custody

You will then need to enter, the Type of Hearing and any Hearing Details before pressing the Insert button:

Type Of Hearing: * Sentence

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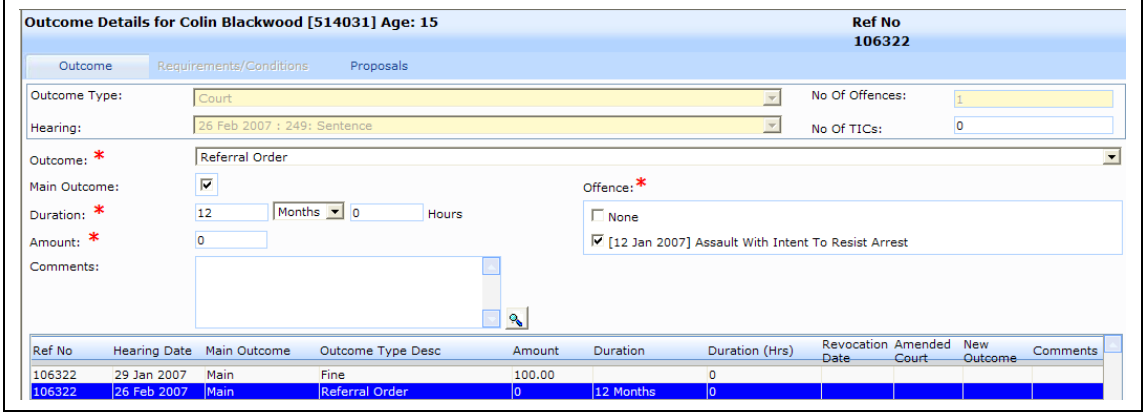
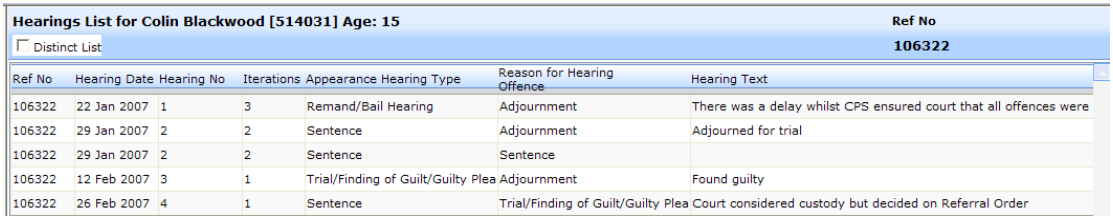
You will be taken to the Appearances Offences Details where you will see the offence in the bottom box and you select that offence. Complete as follows:

Hearing Offence Details
Available Offences:
Offence Detail: * Assault With Intent To Resist [222]
Reason for hearing the offence(s) Trial/Finding of Guilt/Guilty Plea
Hearing Details
Court considered custody but decided on Referral Order
Next Hearing Date
Plea Entered Guilty
Bail or Remand imposed
Bail Conditions and/or Comments
PSR Requested:
PSR Directions:
PSR Due Date:
Hearing Offences
Selected First App Date First App No Off Date Plea PSR Directions Hearing Type PSR Due Date
22 Jan 2007 12 Jan 2007 Guilty Trial/Finding of Guilt/Guilty Plea

Note: At this stage you would actually record the outcome of the Referral Order. The details will be dealt with in the Outcomes module. This would have the effect of removing the offence as one that can be used in future hearings.


Outcome Details for Colin Blackwood [514031] Age: 15
Ref No 106322
Outcome
Requirements/Conditions
Proposals
Outcome Type: Court
No Of Offences: 1
Hearing: 26 Feb 2007 : 249: Sentence
No Of TICs: 0
Outcome: * Referral Order
Main Outcome:
Offence: *
Duration: * 12 Months 0 Hours
None
Amount: * 0
[12 Jan 2007] Assault With Intent To Resist Arrest
Comments:
Ref No Hearing Date Main Outcome Outcome Type Desc Amount Duration Duration (Hrs) Revocation Date Amended Court New Outcome Comments
106322 29 Jan 2007 Main Fine 100.00 0
106322 26 Feb 2007 Main Referral Order 0 12 Months 0

After you have clicked the update button Update and clicked the back button Back you will be returned to the Hearings List where you now will see five hearings:


Hearings List for Colin Blackwood [514031] Age: 15
Ref No 106322
Distinct List
Ref No Hearing Date Hearing No Iterations Appearance Hearing Type Reason for Hearing Offence Hearing Text
106322 22 Jan 2007 1 3 Remand/Bail Hearing Adjournment There was a delay whilst CPS ensured court that all offences were
106322 29 Jan 2007 2 2 Sentence Adjournment Adjourned for trial
106322 29 Jan 2007 2 2 Sentence Sentence
106322 12 Feb 2007 3 1 Trial/Finding of Guilt/Guilty Plea Adjournment Found guilty
106322 26 Feb 2007 4 1 Sentence Trial/Finding of Guilt/Guilty Plea Court considered custody but decided on Referral Order

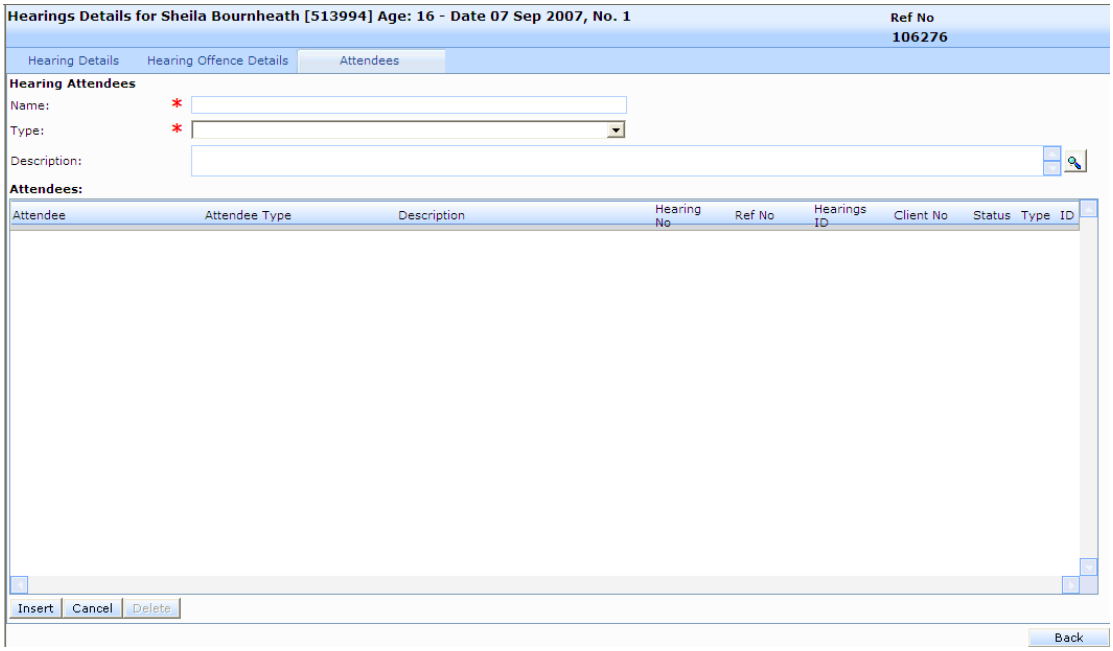
Use of the Attendees Tab

Introduction

This allows you to record the significant people that were present at each and every hearing. Examples would be parents, solicitor, police officer and YOT Duty Officer. Any notes about attendees can be added.

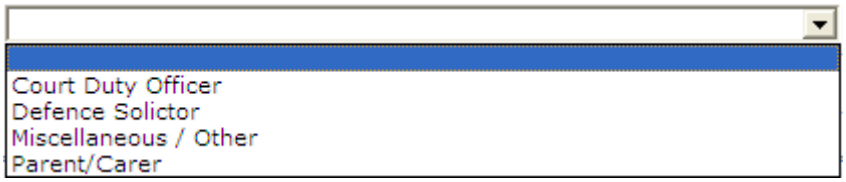
Function

You click on the Attendees tab:

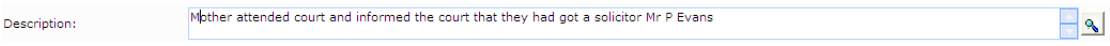


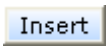
You fill in a Name:

You then chose a Type:



You enter any notes they wish to add:



And finally you click on the 

button and the entry is placed in the Attendees field:

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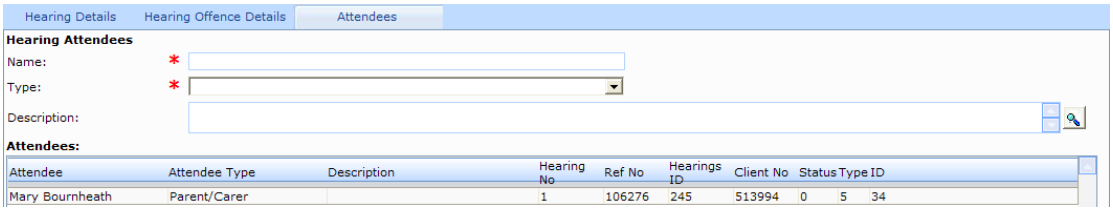
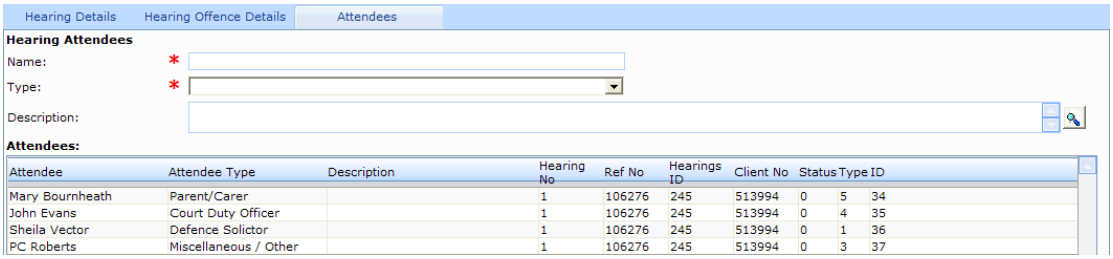


The procedure can be repeated for any other attendees:



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Chapter 8) Outcomes

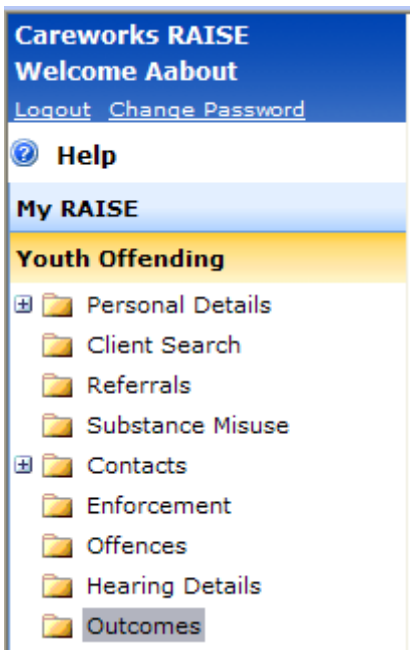
The Outcomes module is where all outcomes either Pre-court or Court outcomes are recorded. Pre-Court outcomes are:

- Police Reprimands
- Final Warnings
- Fixed Penalties

The Court Outcomes covers all possible outcomes that a Court may decide at a Sentence Hearing.

Function

To open Outcomes you identify the icon on the left hand side of the screen and open with a single click:



This opens up a blank Outcomes screen, unless there have been Outcomes previously recorded against that particular referral:

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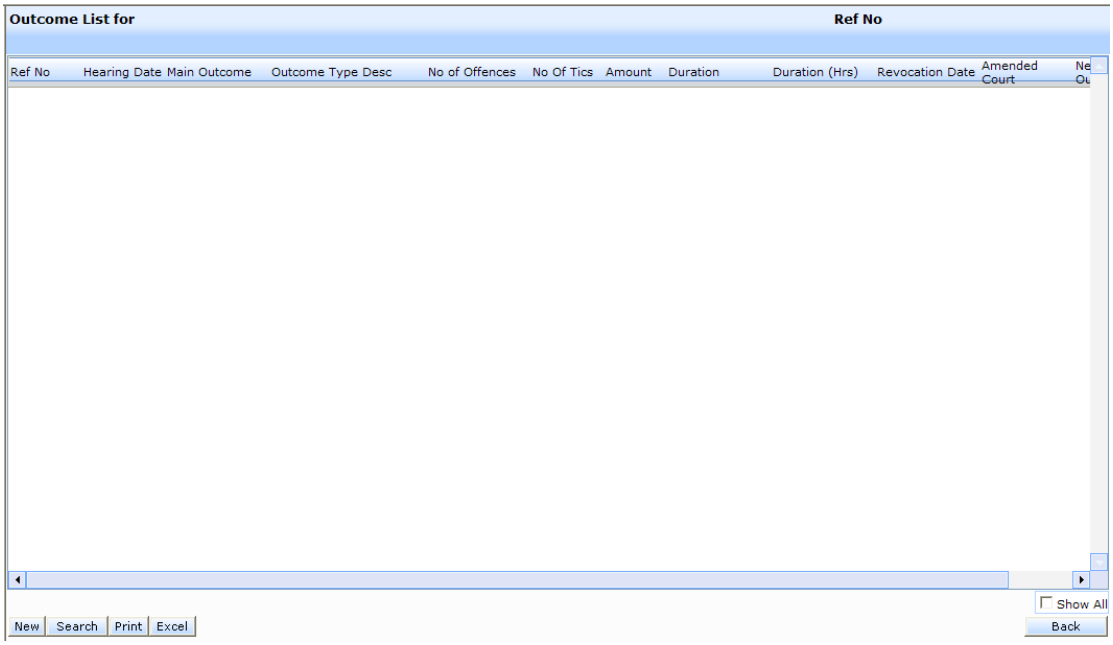
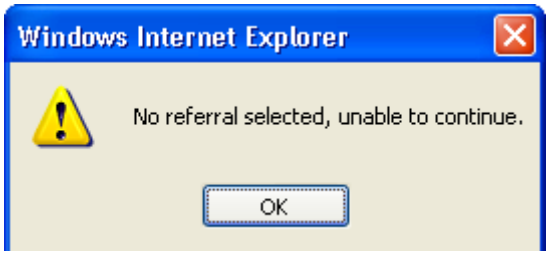
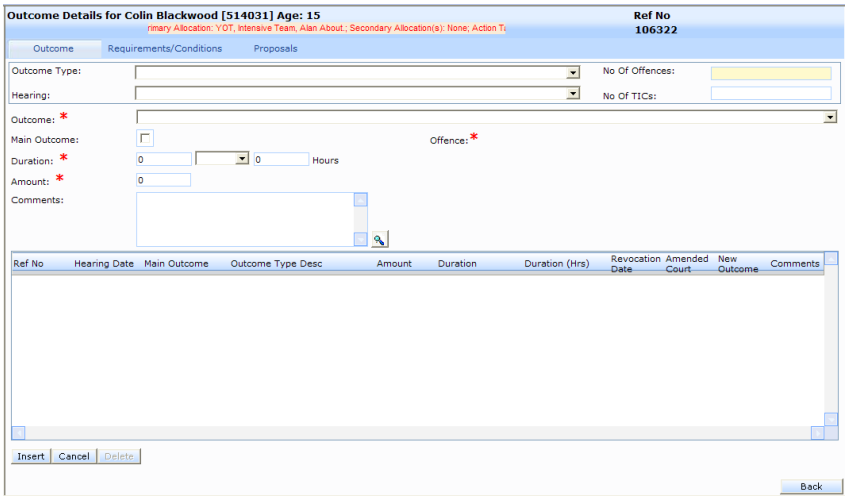


Note: To insert details of an outcome you must have already selected the appropriate referral and when inputting Court Outcomes there must be a hearing of type 'Sentence'. If you attempt to enter an outcome without a referral being open you will see the following reminder:



Clicking on New will open up the following screen:

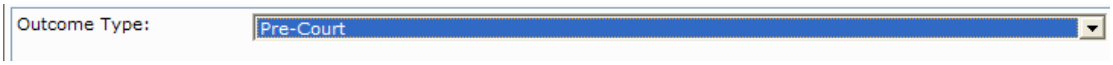


The Outcomes module is presented as three tabs at the top of this screen:

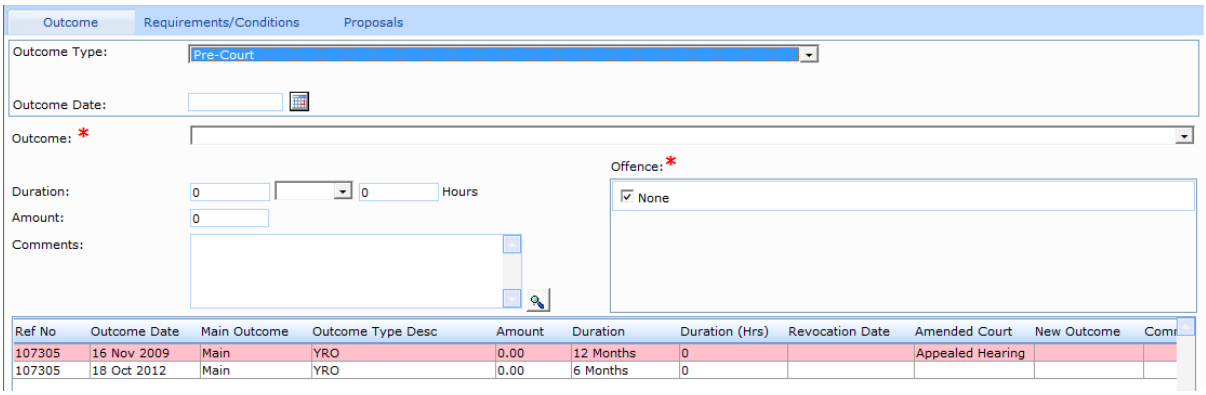
Outcome allows for the input of outcome details. **Requirements and Conditions** is to record details about any conditions or requirements attached to a substantive order. **Proposals** show the professional recommendation that the YOS have made to the court as part of the Pre-Sentence Report or Stand Down Report.

Inserting a Pre Court Outcome

Select the *Outcome Type* from the drop down list:



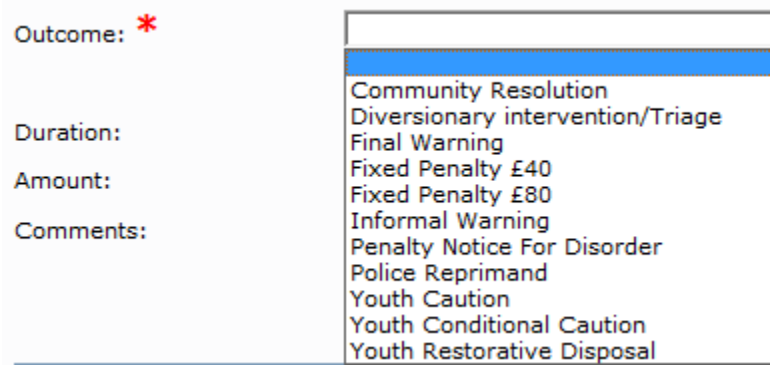
This results in a change to the screen:



Enter the Outcome Date:

Note: The Outcome Date will be the date on which the young person receives their Pre-Court Outcome.

Then select the Pre-Court *Outcome*:



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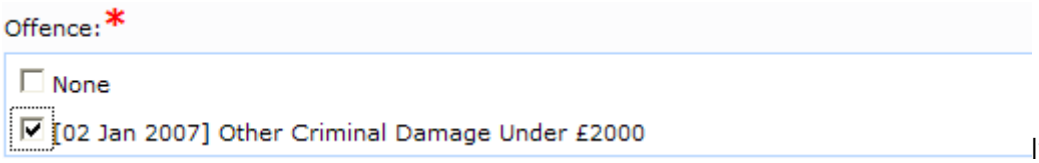
Note: Outcome *Community Resolution* maps to YJB legal outcome type: *Community Resolution*.

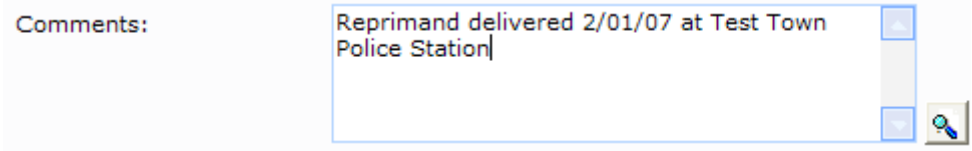
Outcome *Youth Conditional Caution* maps to YJB legal outcome type: *Youth Conditional Caution*.

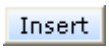
You tick the relevant Offence(s) for which they young person received their Pre-Court Outcome:



If

Any Comments in connection with the Outcome could be recorded:



Finally press 

to add your record and you will receive a confirmation message:

Inserting a Court Outcome

If you selected Court as the Outcome Type then you will see the following:

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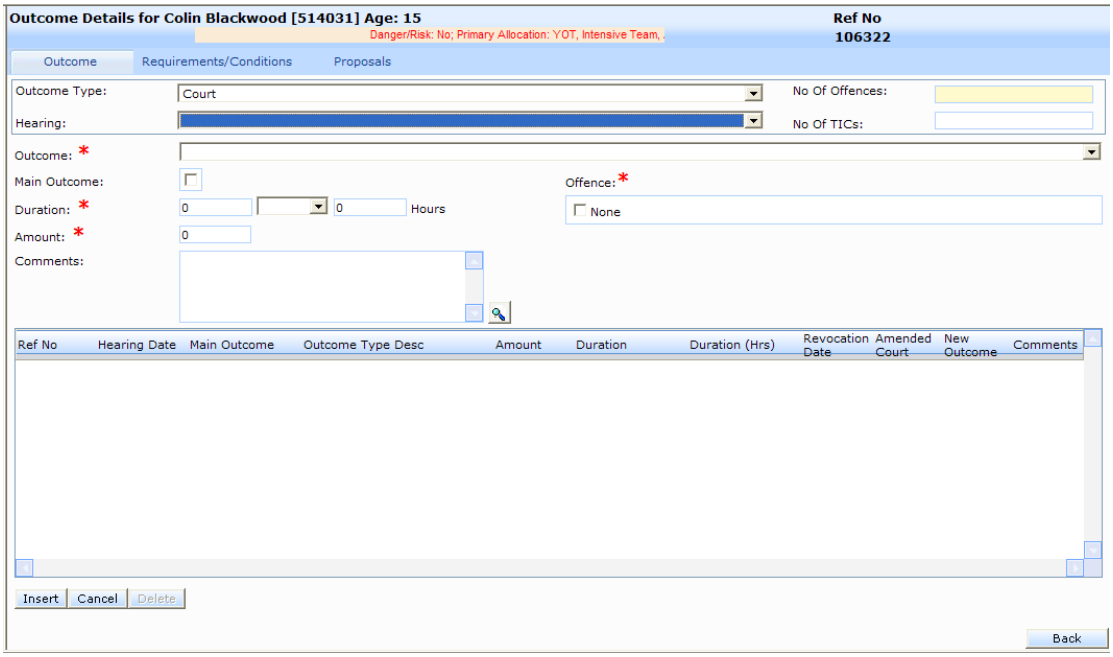
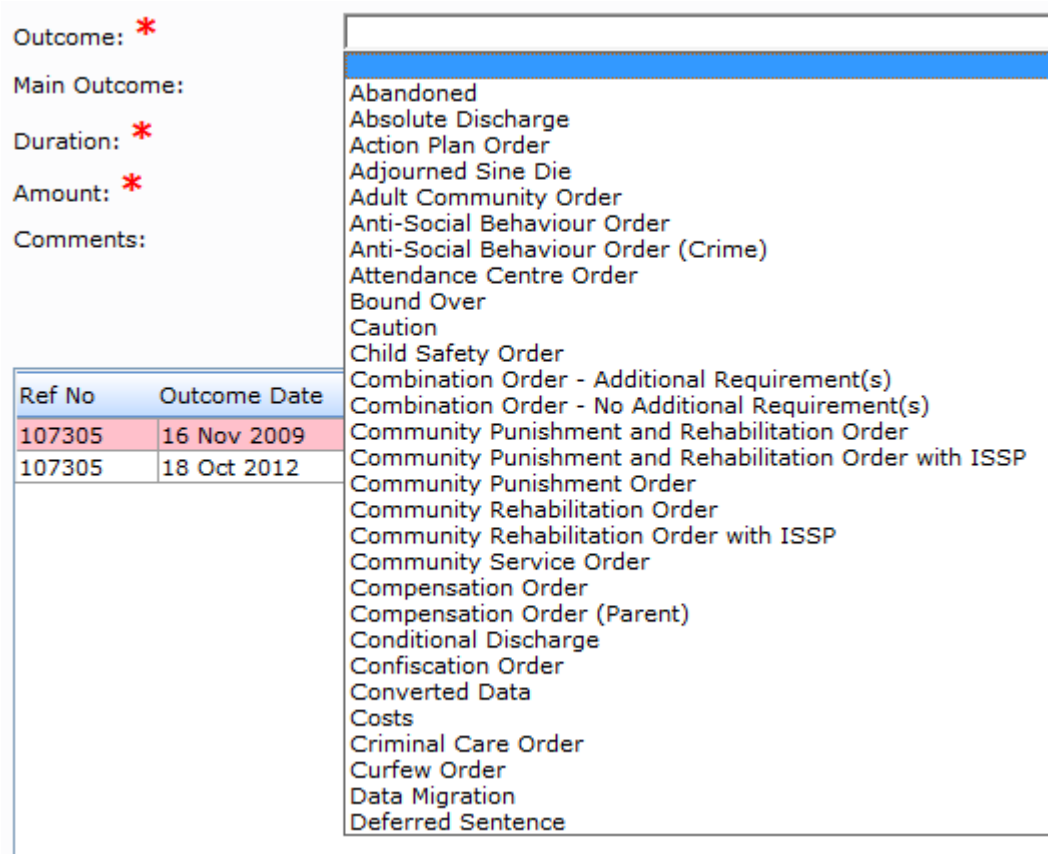


When you select Hearing you will see any related sentence hearings and you choose the appropriate one:

This will then display the relevant offence(s) for that particular hearing. You first record the Main Outcome:



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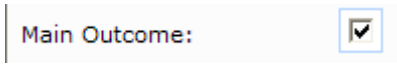
Note: Outcome *Section 226b* maps to YJB legal outcome type: *Section 226b*.

Outcome *Youth Caution* maps to YJB legal outcome type: *Youth Caution*.

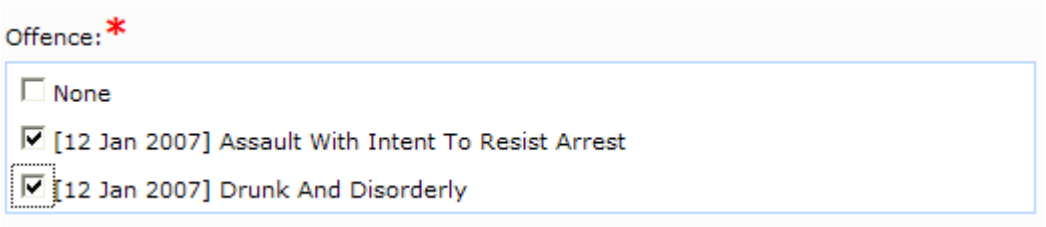
By ticking the box below Outcome you signify that this is the Main Outcome for this hearing:



Enter the Duration of the order:

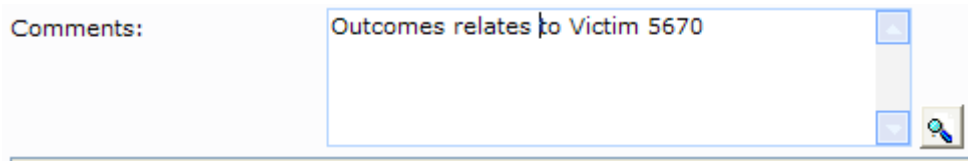
If the outcome was a Fine then obviously you would enter an Amount:

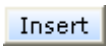
You would then identify each offence that is related to this Main Outcome by ticking the Offences box:



Note: The 'None' facility is there for when Outcome is given that is not related to an offence. Examples would be where an order is revoked for good behaviour or an ASBO is given.

The comments box can be utilised if any relevant comments need attaching to the outcome. An example would be where there was an outcome of Victim Surcharge and the comments box was used to link to the related victim:



You then click on  to insert the outcome.

Note: In the case of a Supervision Order or Community Rehabilitation Order you will receive the following message:

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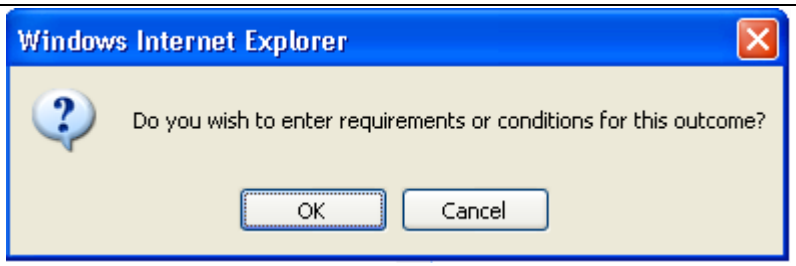


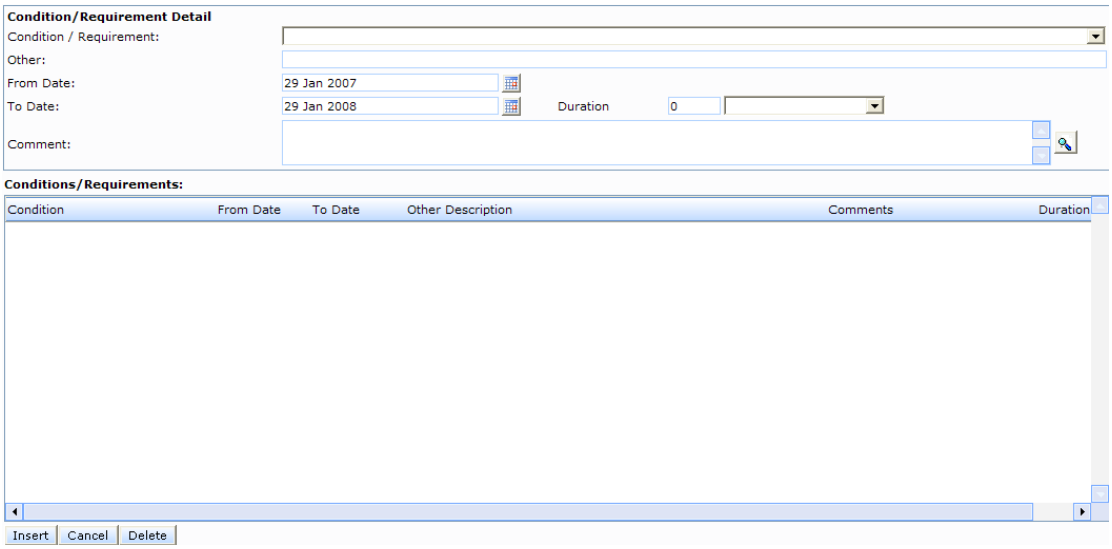
Clicking OK will take you, after a confirmation message, to the Conditions and Requirements tab whilst clicking on Cancel will enter it as an Order with No Conditions or Requirements.

You will receive the following confirmation message;

If there are further outcomes the process is repeated and these inserted.

Entering Requirements/Conditions

This tab allows the entry and recording of any specific requirements or conditions that the court may impose in relation to specific outcomes:



You select the Condition/Requirement from the drop down list:

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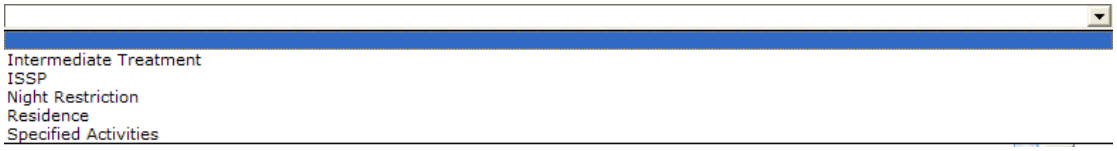
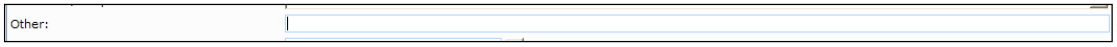
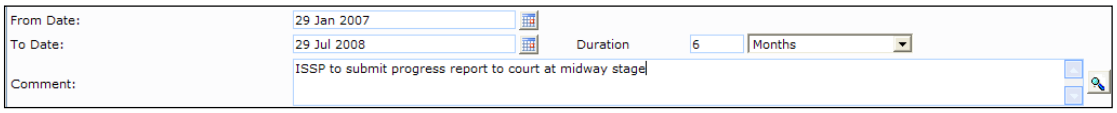
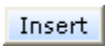


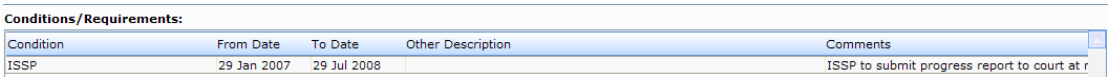
The 'Other' function allows you to record any Additional Conditions if imposed by the Court:



You complete other required detail using the calendar or free text function:



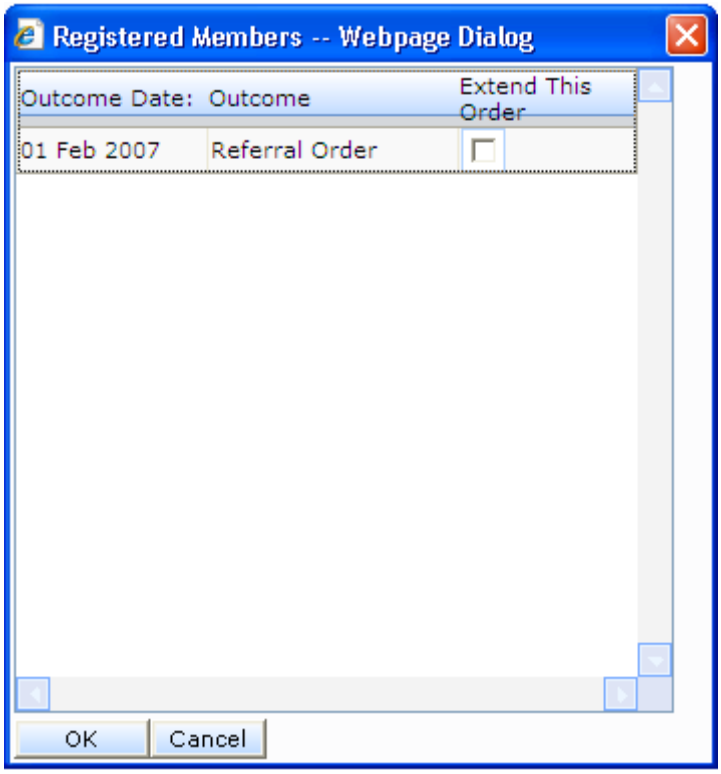
Clicking on  will insert the Condition(s) or Requirement(s):



Note: Any *Requirements/Conditions* attached to an outcome are automatically populated to the Requirements tab in Programmes.

Entering a Referral Order Extension

When entering an outcome of Referral Order extension you are required to associate it with the originating Referral Order:



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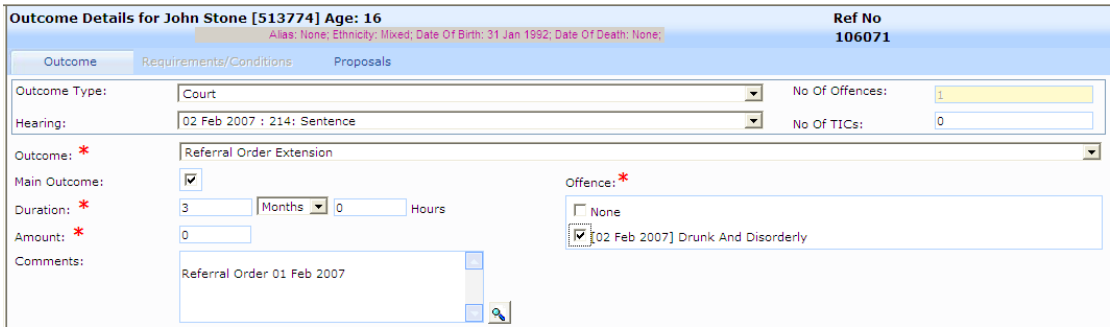
You tick the order that is to be revoked and click on OK. You will be returned to the outcomes screen where you complete the entry of the extension:



You click on Insert and you will receive the following confirmation message:

Note: You will need to go to the Referral Order Programme and extend the end date of that programme.

Entering a revocation of an existing order

If you have an order revoked then in the first instance you should enter the new outcome that has replaced the order revoked, unless it is an early discharge based on a young person positively responding to the original order. In addition the new order will be the main outcome unless again it is an early discharge.

When you enter an outcome of 'Order Revoked' you will be presented with the following screen:

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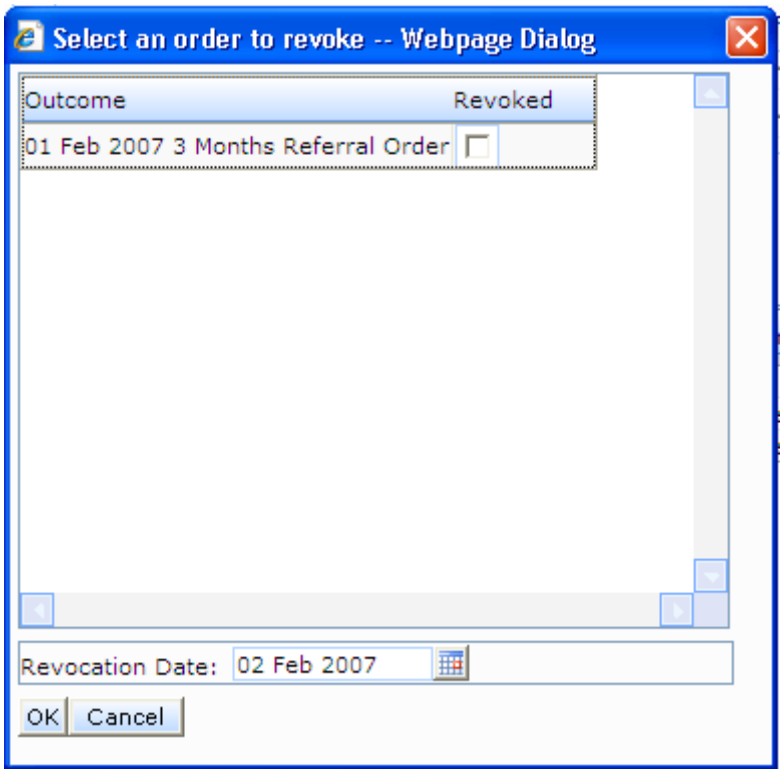
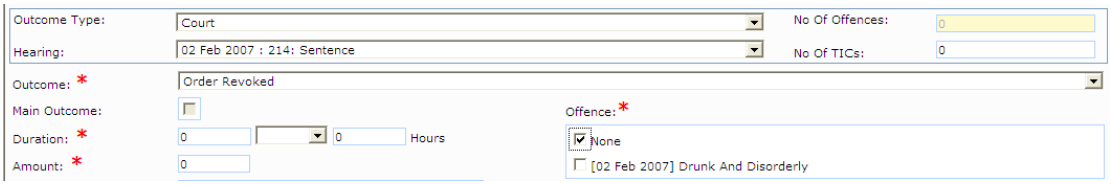


Having ticked the relevant order you click on OK. You will be returned to the outcomes screen where you complete the entry:



Note: In the Offences box you would tick none if the revocation was based on an early discharge. If the revocation was based on non-compliance you would tick the new breach offence. If the revocation was based on further offending you would tick the relevant offences.

You click on Insert and you will receive the following confirmation message:

You will then be returned to the programme that supports the revoked order so that you enter a new end date:

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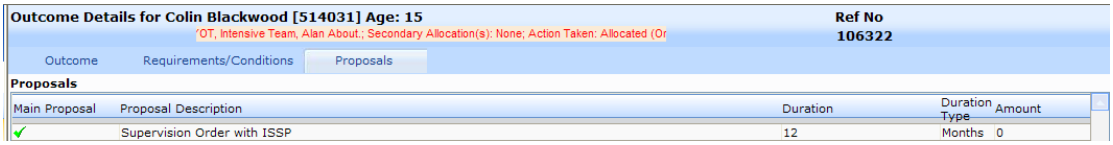
Proposals

Entries appear in the Proposals tab where specific proposals have been made to Court as part of a PSR. PSR proposals are added in the Proposals tab of Assessments and Documentation following the completion of a Pre-Sentence Report:



Note: The entry in this field is to allow you to compare your professional recommendation with the legal outcome.

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Chapter 9) Programmes

The Programmes module is where details of all Programmes and Orders can be viewed and recorded. Some programmes are created automatically following the input of certain court outcomes. Other programmes can be created manually particularly those in the prevention arena. This gives the practitioner the start point for the management of all programmes for which they may be responsible.

To access the Programmes module, click The **Programmes** folder icon:

You can view Programmes in several ways.

- With no client selected
- With a client selected
- With a client and a referral selected

Viewing the Programmes Listing with no Client selected

Selecting the programmes folder displays all programmes for all clients of which you are the responsible worker, (if the programmes are not complete or concluded).

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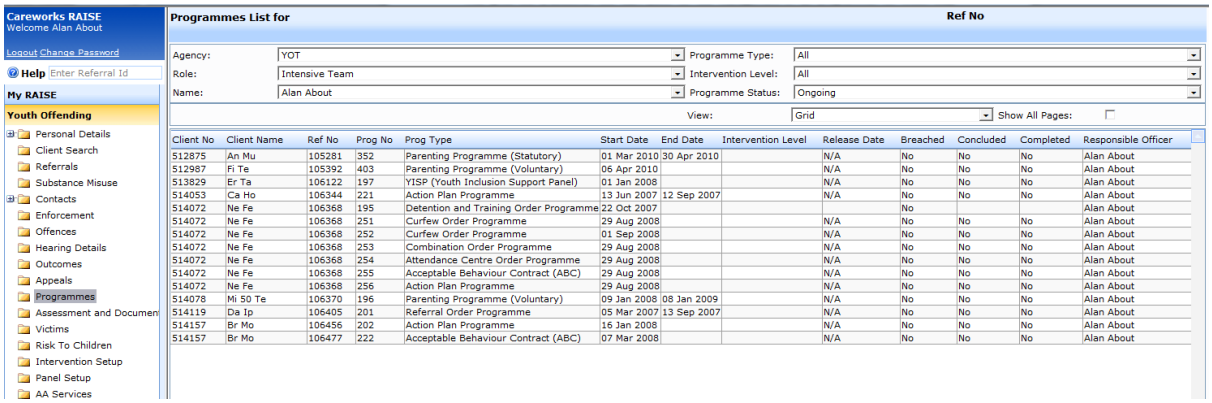
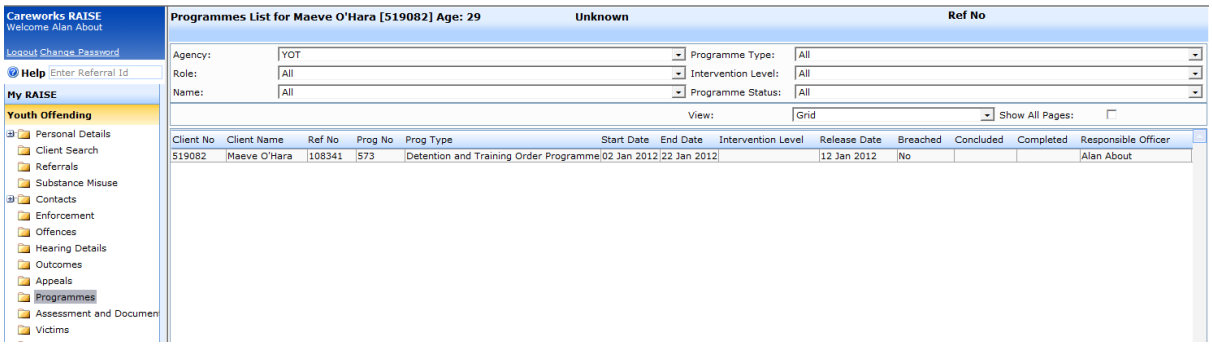

Careworks RAISE
Welcome Alan About
Logout Change Password
Help Enter Referral Id
My RAISE
Youth Offending
Personal Details
Client Search
Referrals
Substance Misuse
Contacts
Enforcement
Offences
Hearing Details
Outcomes
Appeals
Programmes
Assessment and Documen
Victims
Risk To Children
Intervention Setup
Panel Setup
AA Services
Programmes List for
Ref No
Agency: YOT
Role: Intensive Team
Name: Alan About
Programme Type: All
Intervention Level: All
Programme Status: Ongoing
View: Grid
Show All Pages:
Client No | Client Name | Ref No | Prog No | Prog Type | Start Date | End Date | Intervention Level | Release Date | Breached | Concluded | Completed | Responsible Officer
512875 | An Mu | 105281 | 352 | Parenting Programme (Statutory) | 01 Mar 2010 | 30 Apr 2010 | | N/A | No | No | No | Alan About
512987 | Fi Te | 105392 | 403 | Parenting Programme (Voluntary) | 06 Apr 2010 | | | N/A | No | No | No | Alan About
513829 | Er Ta | 106122 | 197 | YISP (Youth Inclusion Support Panel) | 01 Jan 2008 | | | N/A | No | No | No | Alan About
514053 | Ca Ho | 106344 | 221 | Action Plan Programme | 13 Jun 2007 | 12 Sep 2007 | | N/A | No | No | No | Alan About
514072 | Ne Fe | 106368 | 195 | Detention and Training Order Programme | 22 Oct 2007 | | | | No | | | Alan About
514072 | Ne Fe | 106368 | 251 | Curfew Order Programme | 29 Aug 2008 | | | N/A | No | No | No | Alan About
514072 | Ne Fe | 106368 | 252 | Curfew Order Programme | 01 Sep 2008 | | | N/A | No | No | No | Alan About
514072 | Ne Fe | 106368 | 253 | Combination Order Programme | 29 Aug 2008 | | | N/A | No | No | No | Alan About
514072 | Ne Fe | 106368 | 254 | Attendance Centre Order Programme | 29 Aug 2008 | | | N/A | No | No | No | Alan About
514072 | Ne Fe | 106368 | 255 | Acceptable Behaviour Contract (ABC) | 29 Aug 2008 | | | N/A | No | No | No | Alan About
514072 | Ne Fe | 106368 | 256 | Action Plan Programme | 29 Aug 2008 | | | N/A | No | No | No | Alan About
514078 | Mi 50 Te | 106370 | 196 | Parenting Programme (Voluntary) | 09 Jan 2008 | 08 Jan 2009 | | N/A | No | No | No | Alan About
514119 | Da Ip | 106405 | 201 | Referral Order Programme | 05 Mar 2007 | 13 Sep 2007 | | N/A | No | No | No | Alan About
514157 | Br Mo | 106456 | 202 | Action Plan Programme | 16 Jan 2008 | | | N/A | No | No | No | Alan About
514157 | Br Mo | 106477 | 222 | Acceptable Behaviour Contract (ABC) | 07 Mar 2008 | | | N/A | No | No | No | Alan About

Viewing Programmes with a Client or Referral Selected

If you have a Client selected, when you click the Programmes folder the Programmes screen is displayed with a grid list of,

- ✓ all programmes (both ongoing and complete)
- ✓ For the selected client
- ✓ And for all referrals recorded against the selected Client


Careworks RAISE
Welcome Alan About
Logout Change Password
Help Enter Referral Id
My RAISE
Youth Offending
Personal Details
Client Search
Referrals
Substance Misuse
Contacts
Enforcement
Offences
Hearing Details
Outcomes
Appeals
Programmes
Assessment and Documen
Victims
Programmes List for Maeve O'Hara [519082] Age: 29
Unknown
Ref No
Agency: YOT
Role: All
Name: All
Programme Type: All
Intervention Level: All
Programme Status: All
View: Grid
Show All Pages:
Client No | Client Name | Ref No | Prog No | Prog Type | Start Date | End Date | Intervention Level | Release Date | Breached | Concluded | Completed | Responsible Officer
519082 | Maeve O'Hara | 108341 | 573 | Detention and Training Order Programme | 02 Jan 2012 | 22 Jan 2012 | | 12 Jan 2012 | No | | | Alan About

Programmes Listing

The Programmes listing screen has six filters at the top of the screen.

When a Client or Referral is selected,

Agency defaults to YOT,

Role and *Name* each default to 'All' (with ability to manually select other Roles and Names under YOT Agency).

Programme Type defaults to 'All' (with ability to manually select specific Programme Types)

Intervention Level defaults to 'All' (with ability to manually select specific Intervention Levels)

Programme Status defaults to 'All' (with ability to manually select specific status – on-going or completed).

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Show All Pages is disabled. If show all is selected, the current referral is deselected, and all programmes are displayed for the current client.

Columns displayed in the Programmes Grid

The default columns listed in the Programmes grid are:

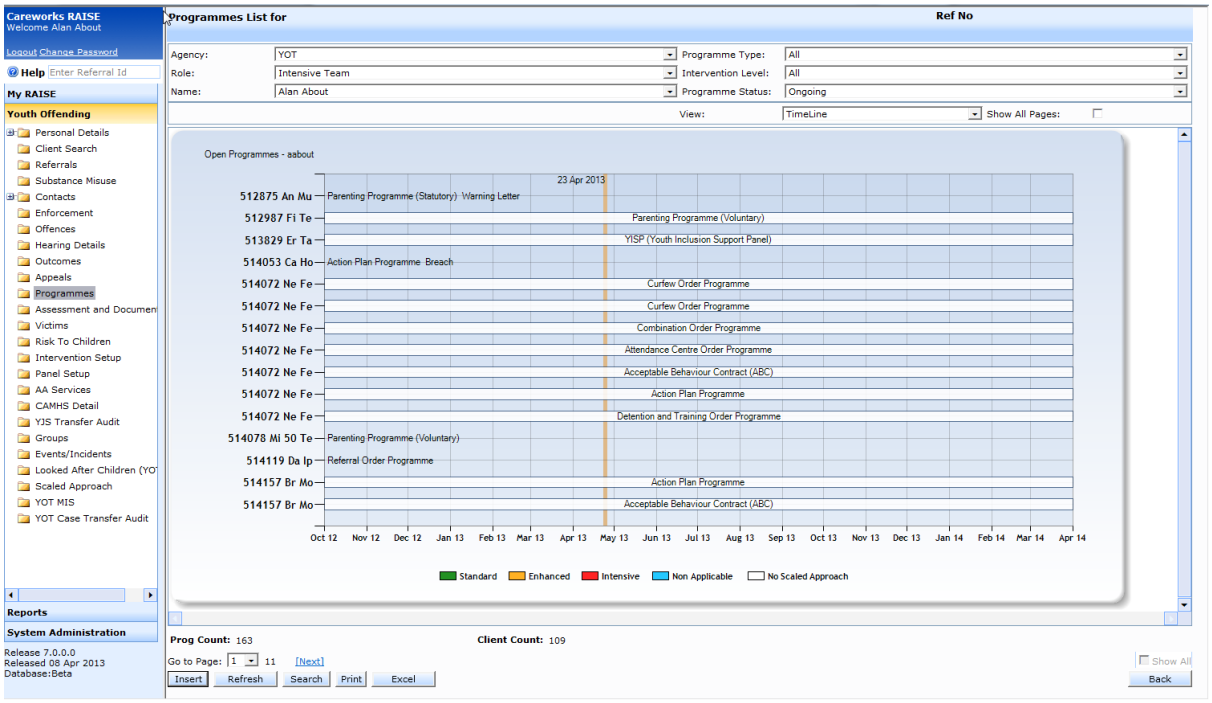
Created Date, *Start Date*, *End Date*, *Intervention Level*, *Release Date*, *Case No*, *Ref No*, *Prog No*, *Client No*, *Surname*, *Middle Name*, *First Name*, *Action Taken*, *Programme Type*, *Allocated To*, *Agency* and *Role*.

The columns displayed in the Programmes grid are explained in detail in the *Programme Details* section.

Displaying Programmes in a Timeline

Programmmes can be displayed in either the default grid format or as a time line, showing the duration of the programme as a timeline.

To display the programmes list in a graphical time line view, select *Timeline* from the **View** drop down list.



The Timeline view can still be filtered.

Viewing a Programme

Select a Programme to view it. Once a Programme is displayed, it has programme function buttons, and a grid.

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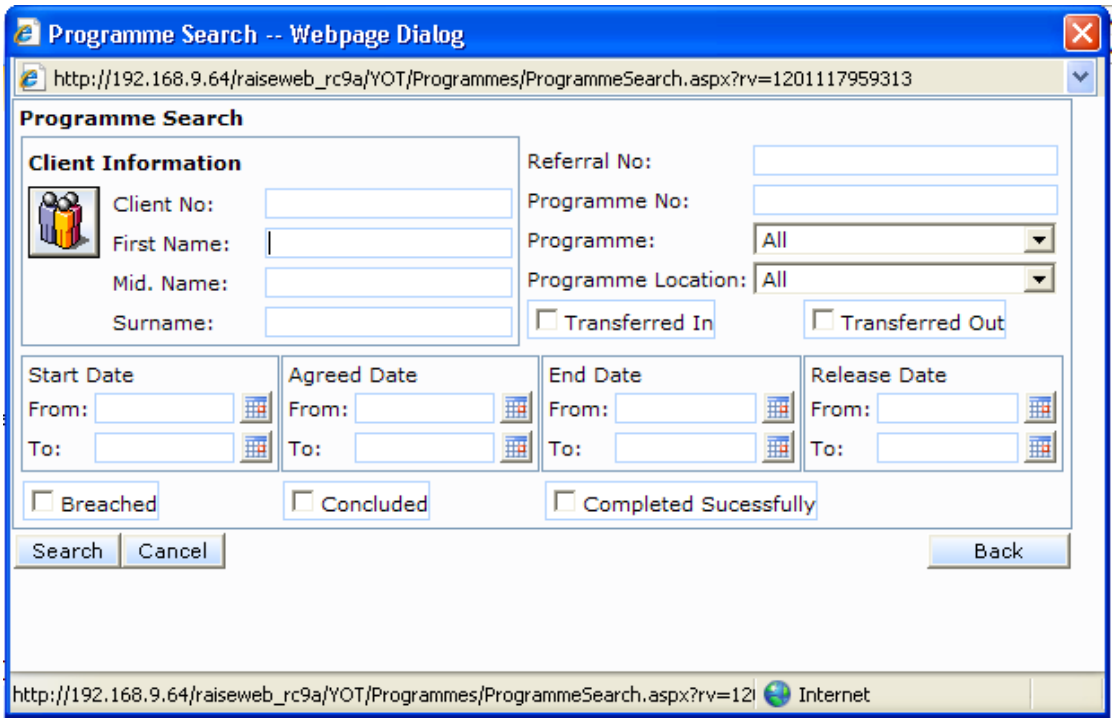
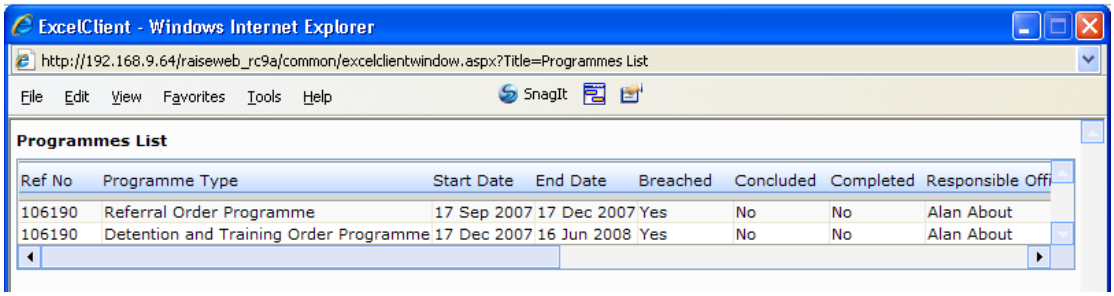
Programmes Function Buttons

There are a number of function buttons on the *Programmes* screen. Their functions are as outlined below.

- The Search button opens up a screen that allows basic searches to be conducted:



- The Print button allows you to print off programmes:



- The Excel button allows you to choose details of programmes and export to Excel:

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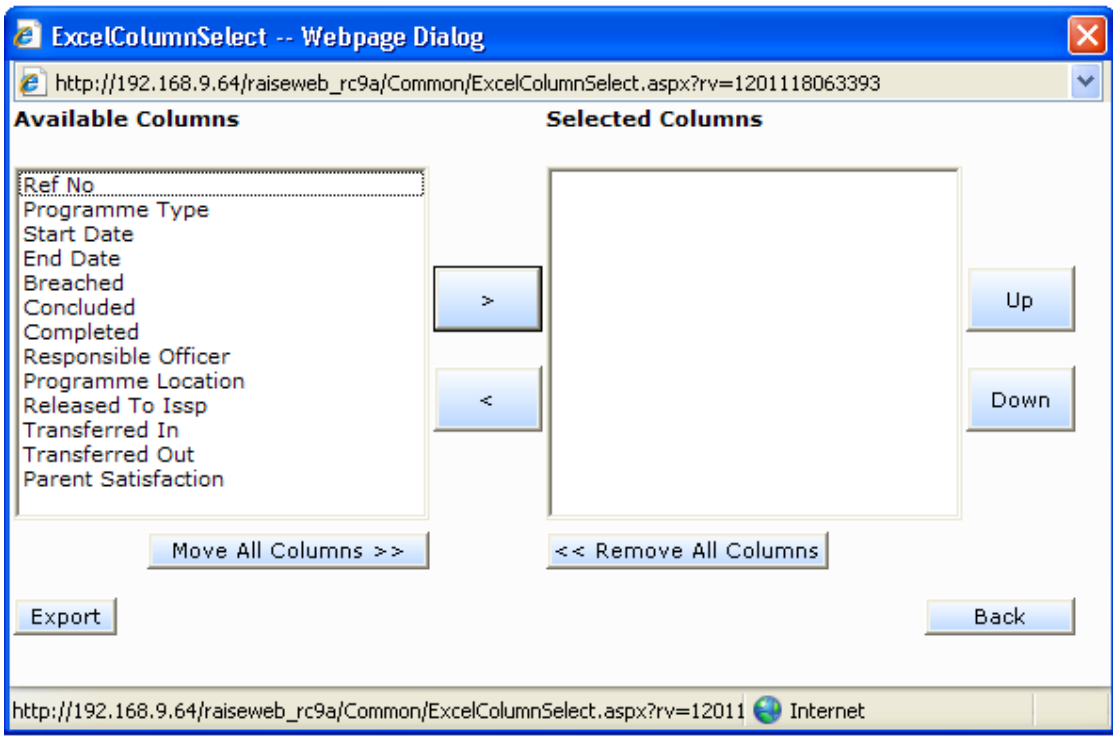
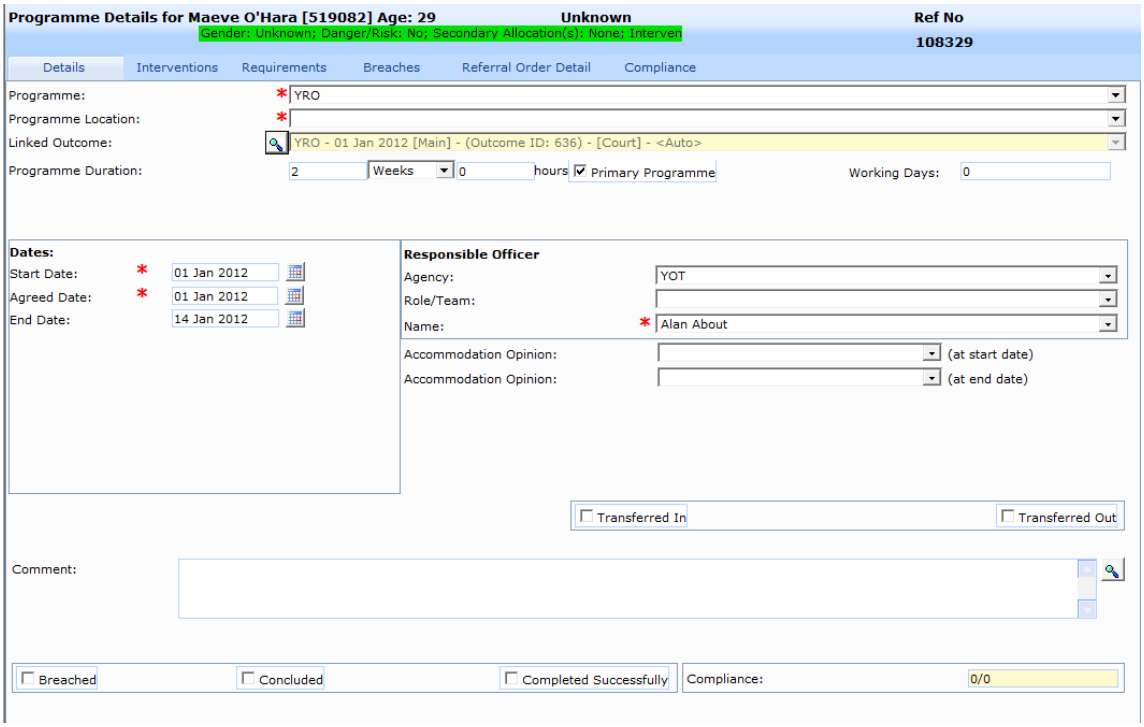


- If a referral is selected, clicking the *Show All* check box displays all the young person's programmes in the grid and not just those related to the particular referral.
- Double clicking on any record in the grid opens the record to allow you to add specific details of the programme:



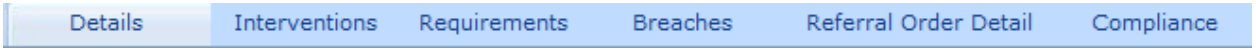
Where a programme has been created **automatically** from a Court Outcome then you are expected to complete and update the programme by filling in the following fields:

- Programme location
- Duration
- Agreed date

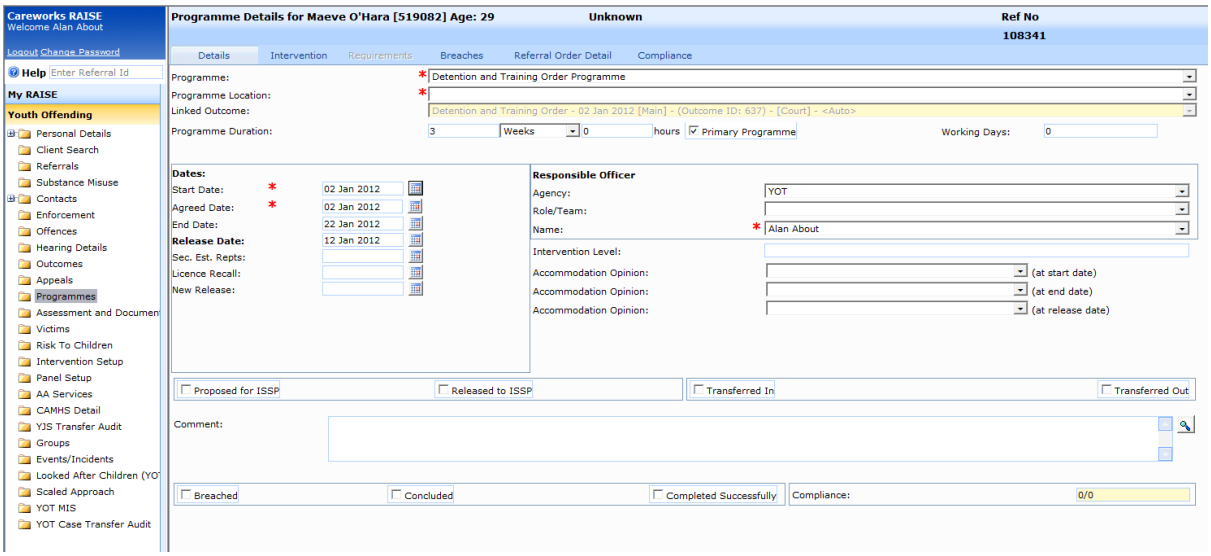
Where a programme is being created **manually** then you will be expected to fill all the mandatory fields before clicking on Update.

Six information tabs are displayed:

- Details
- Interventions
- Requirements (Only displayed if a YRO program type is selected)
- Breaches
- Referral Order Detail
- Compliance



Programme Details



On all programmes there are common details of the programme which are recorded:

Field	Description

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Programme	This is the type of programme such as YIP Programme or Action Plan Programme. Youth Detention Accommodation - YOI: All Youth Detention Accomodation programmes are mapped to YJB Programme Type 'Other' Youth Detention Accommodation - STC Youth Detention Accommodation - SCH Youth Conditional Caution: Mapped to YJB Programme Type 'Youth Conditional Caution Programme' Youth Caution: Mapped to YJB Programme Type 'Youth Caution Programme' Section 226b: Mapped to YJB Programme Type 'Section 226b Programme'
Programme Location	This depends upon whether your service operates from more than base.
Linked Outcome	This will be automatically filled if it is a specific Court Outcome or can be manually entered. In the case of prevention programmes there is no need to create this link.
Programme Duration	Where known this can be entered and **CareDirector Youth** will then calculate the End Date automatically. In the case of certain programmes such as prevention programmes it is unnecessary unless they are a fixed duration. Can be recorded as number of nights.
Primary Programme	This refers to what is the main programme in relation to the originating referral. Where the programme is created automatically from an Outcome, this box will then be automatically filled. Where a programmes commences before the outcome is known (such as a Final Warning Programme) or where there is no outcome such as a Prevention Programme this will need to be ticked when the programme is automatically created.
Working Days	This is calculated by taking the Agreed Date from the Start Date, minus weekends and bank holidays. This is used for various National Standards and will vary dependent upon the type of programme.
Dates	
Start Date	This is the date on which the programme starts and/or the date on which the young person is sentenced.
Agreed Date	This will vary dependent upon the type of programme. For example for a Referral Order Programme it will be the date on which the Initial Panel meets. In this example the date is needed to create the End Date as a Referral Order duration runs from the date of the Initial Panel meeting.

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	Supervision Orders, Community Rehabilitation Orders and Custodial programmes require this date for National Standard purposes.
End Date	This is the date on which the programme finishes or the court order runs out. If duration is entered then this will be calculated automatically.
Release Date	This is the date on which is estimated the young person will be released. **Licence Recall** **New Release**
Sec, Est Repts	This is the date on which you dispatched electronically or via the escort services the required papers for someone going into custody.
Licence Recall	This is the date upon which the young person was recalled to custody following non-compliance with conditions.
New Release	This is the new release date following recall.
Responsible Officer	
Agency	This will identify who has primary allocation for the programme.
Role/Team	This will identify who has primary allocation for the programme.
Name	This will identify who has primary allocation for the programme.
Intervention Level	Displays the different Intervention Levels represented in the current listed records, enabling users to filter the list by Intervention Level. Displays 'All' by default. 5. The intervention level is displayed in red if it is for a date older than three months. 6. The intervention level is displayed in black if it is for a date within the last three months. The intervention level does not change once the programme is flagged as *Completed successfully* or *Concluded*. Closed Programmes are displayed as *Not Applicable*.
Accommodation Opinion	This is where you record the Accommodation Opinion at the end of a programme based on the Leaving Care Act. **Note:** It is quite possible that a young person could have both the Breached and Completed Successfully boxes ticked. In this example they could have had their breach hearing upheld and asked to continue on the order which then complied with and completed. In Parenting Programmes (Voluntary and Statutory) there are specific details:

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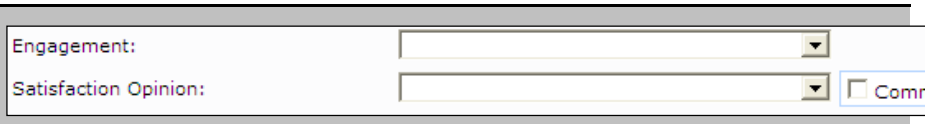
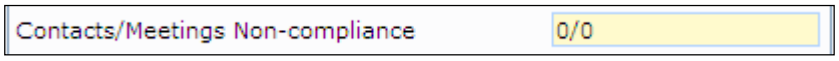
	
Proposed to ISSP	This is ticked when either the governor of the YOI or the ISSP team make a proposal for the young person to be released to ISSP.
Released to ISSP	This is ticked following acceptance by the governor of the YOI to release the young person to ISSP. On all programmes there is a compliance display box:  This will indicate to you the number of actual attendances at a particular programme against the number of planned attendances. Further details can be found in the Compliance tab or within Contacts and Enforcements.
Transferred In	This indicates where a young person has been transferred in from another YOT.
Transferred Out	This indicates where you have transferred the young person to another YOT or Probation.
Breached	This is where the young person has been breached for non-compliance or further offending.
Concluded	This indicates where a young person has had their original programme replaced with another for a variety of reasons including breach, failure to finish the programme or have transferred to another YOT.
Completed Successfully	This is where the young person has successfully completed the required programme. On certain programmes there are additional details: • Transferred In • Transferred Out • Breached • Accommodation Opinion
Engagement	This is the degree to which the identified parent/s engaged with the programme.
Satisfaction Opinion	This is the parents' rating of the programme offered by the YOT.

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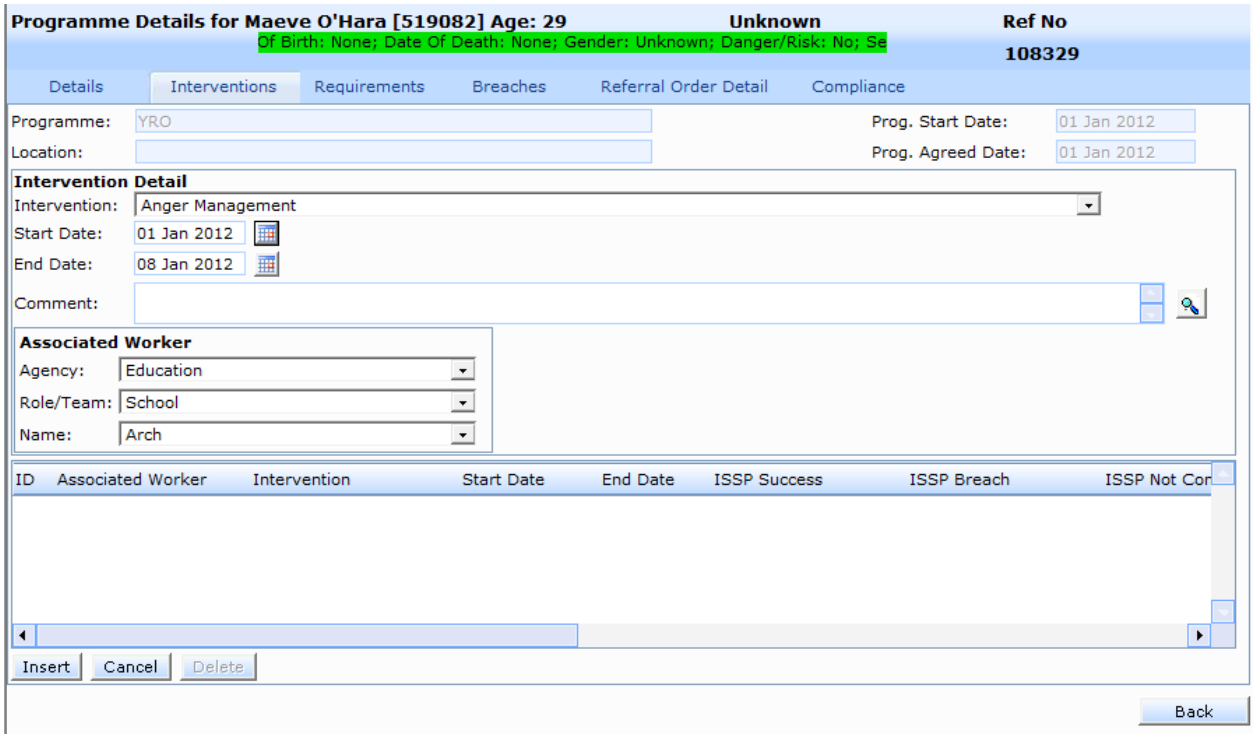
Commented	This indicates whether they have replied to your questionnaire.

Note: These will only show if they are a contact type recorded against the particular programme.

Interventions Tab

Once Programme Details have been inserted successfully, the Interventions tab allows you to enter details of any planned intervention for that programme:



Details are entered and saved using the Insert button and can be amended using the Update button.

Note: When adding a Parenting Intervention where no parent has been entered you will get the following prompt:

Clicking on OK will take you the Relationships tab of Personal Details where the parent(s)/carer can be entered before returning to the Interventions tab.

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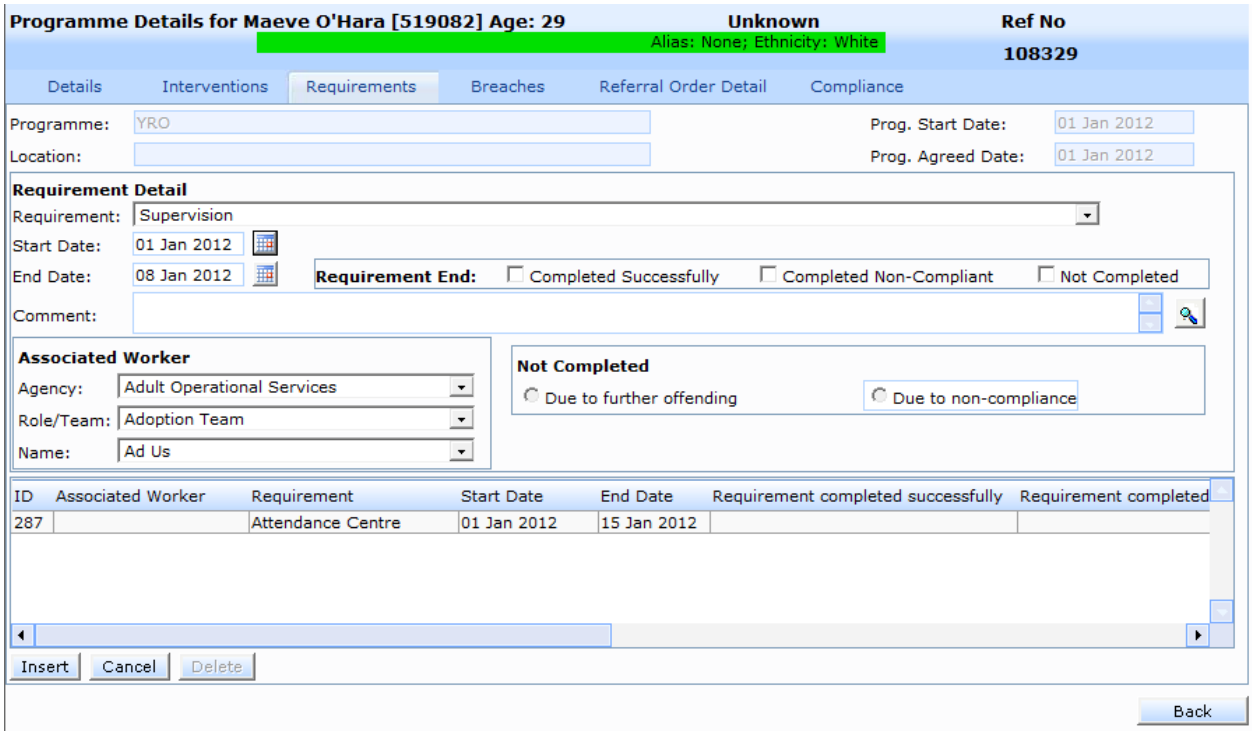
Requirements Tab

Note: The Requirements tab is only enabled if a YRO programme type is selected.

Once YRO Programme Details have been inserted successfully, the *Requirements* tab allows you to enter details of requirements for that programme:



This tab contains the same information as the *Requirements* tab in the Outcomes module.

Details are entered and saved using the Insert button and can be amended using the Update button.

Note: A Programme is automatically added if a requirement has been added to an *Outcome*. The Requirements tab of the programme will be auto-populated with the same requirement from the *Outcome*.

Requirements added to a programme are listed in the *Contacts* module and can be linked to as long as the requirement is still active. When the requirement end date has passed, the requirement can no longer be linked to in contacts.

Breaches Tab

The Breaches tab allows you to record a formal breach decision including the Date of Breach Proceedings, Date of Court Application and Continuance Date if appropriate:

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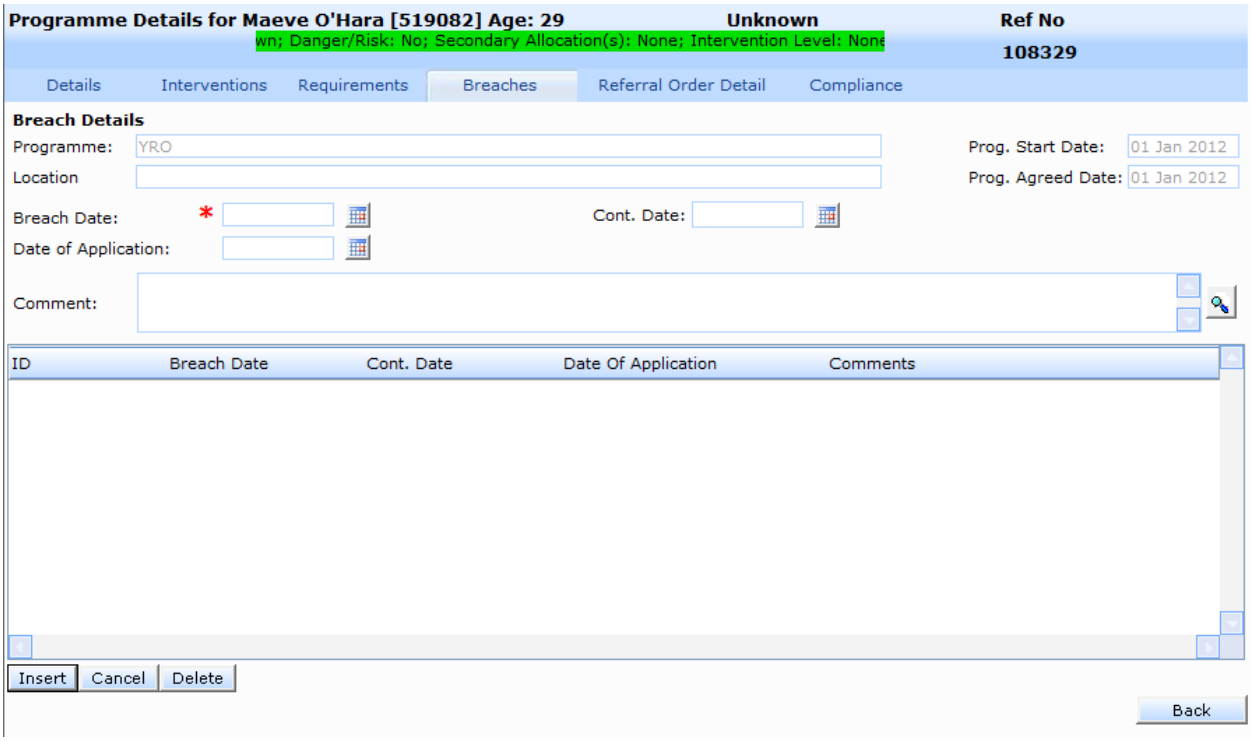


Breach Date

This is the date on which the decision to breach was taken.

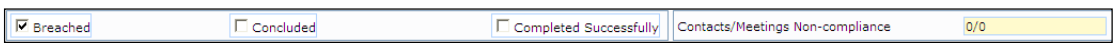
Date of Court Application

This is the date when you applied to the court.

Continuance Date

This is the date on which the court decided that the current order would continue, even though the breach had been founded.

Once a breach is inserted the breach the tick box on the details screen will become checked.



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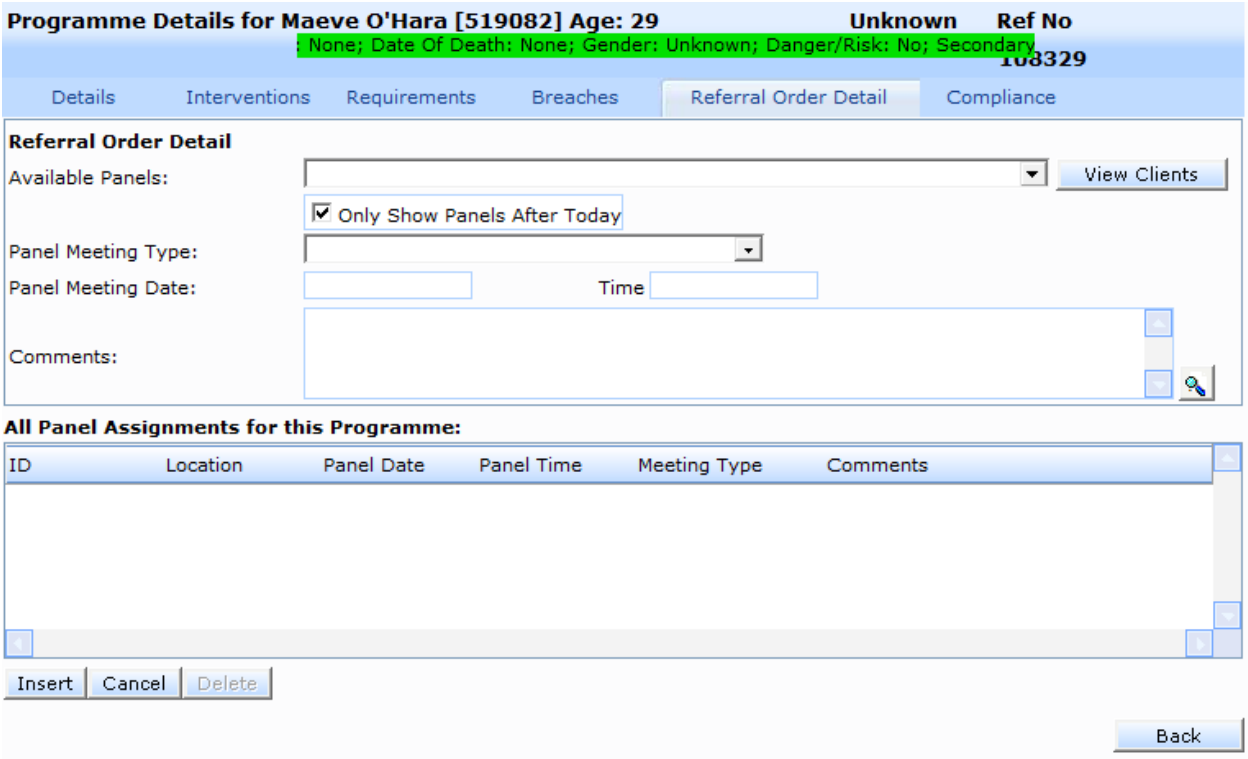
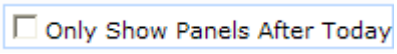
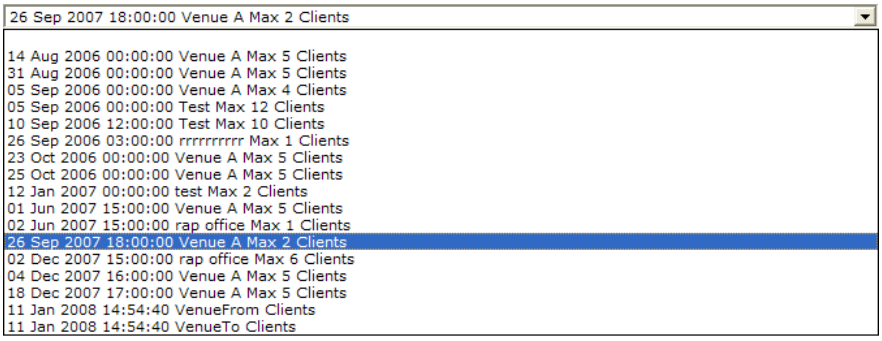
Referral Order Details Tab



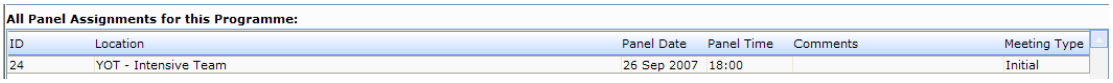
Note: Un-ticking the 'Only Show Panels After Today' will show all historical panels:



This tab provides an area to record the Referral Order Panel, the Type of Panel Meeting and the dates of those meetings together with any free text commentary required. Clicking on the available panel's dropdown gives you a view of all panels that have already been set up:


26 Sep 2007 18:00:00 Venue A Max 2 Clients
14 Aug 2006 00:00:00 Venue A Max 5 Clients
31 Aug 2006 00:00:00 Venue A Max 5 Clients
05 Sep 2006 00:00:00 Venue A Max 4 Clients
05 Sep 2006 00:00:00 Test Max 12 Clients
10 Sep 2006 12:00:00 Test Max 10 Clients
26 Sep 2006 03:00:00 rrrrrrrrr Max 1 Clients
23 Oct 2006 00:00:00 Venue A Max 5 Clients
25 Oct 2006 00:00:00 Venue A Max 5 Clients
12 Jan 2007 00:00:00 test Max 2 Clients
01 Jun 2007 15:00:00 Venue A Max 5 Clients
02 Jun 2007 15:00:00 rap office Max 1 Clients
26 Sep 2007 18:00:00 Venue A Max 2 Clients
02 Dec 2007 15:00:00 rap office Max 6 Clients
04 Dec 2007 16:00:00 Venue A Max 5 Clients
18 Dec 2007 17:00:00 Venue A Max 5 Clients
11 Jan 2008 14:54:40 VenueFrom Clients
11 Jan 2008 14:54:40 VenueTo Clients

Details are entered and saved using the Insert button and can be amended using the Update button:



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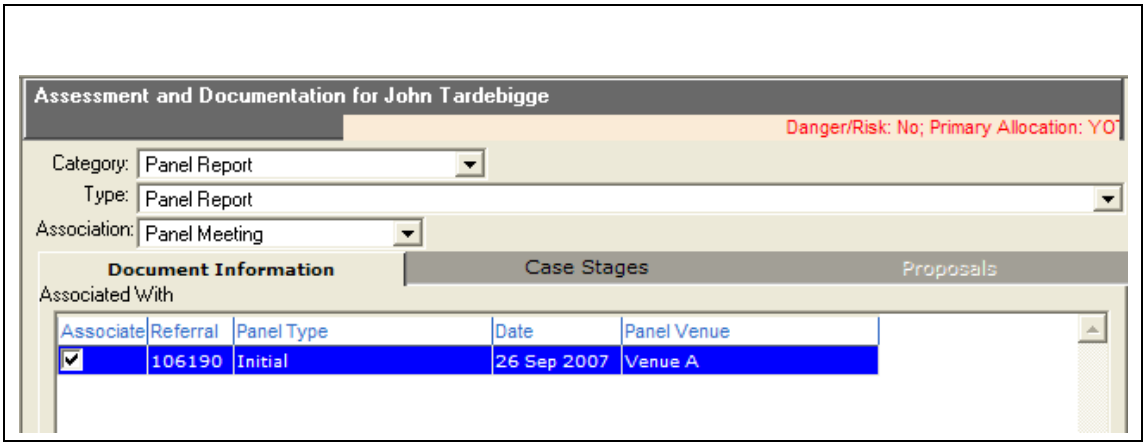
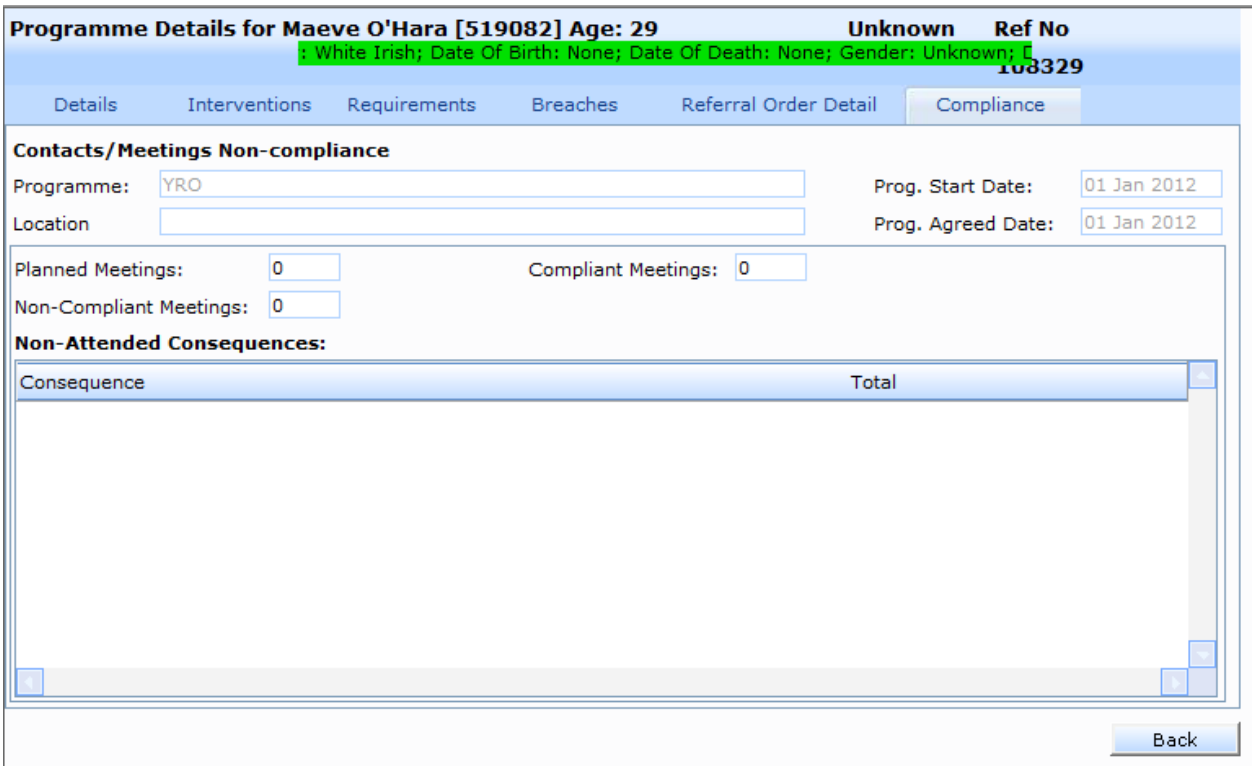
Note: The Panel Date has to be entered here if on Assessments and Documentation you want to associate the report with the particular panel:



Compliance Tab

Compliance is a measurement of client attendance at planned statutory contacts and is informed by both the Contacts and Enforcement modules.



When a programme is set up for a client any number of planned statutory contacts can be linked to that programme. If these are recurring contacts they can be set up in Contacts module using the recurring option and entering the required number of reoccurrences.

Note: The Contact Type needs to be *Counts Towards Programme* to enable it to be attached to a programme.

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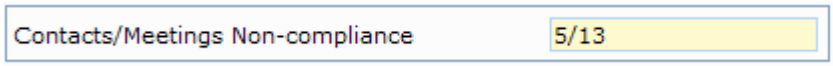
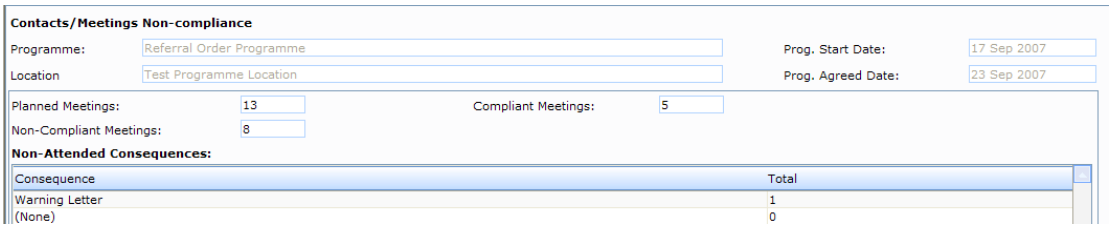
As these Planned Contacts become Actual Contacts or not then this is reflected in the Compliance panel:



Note: The Compliance tab needs to be viewed in order to see the consequences of any non-compliance:



The Non Attendance Consequences, such as Warning Letter, are displayed as a result of what is entered in the Enforcement module.

Note: When you view the Non-Compliant Meeting window bear in mind that these can be a mixture of non-attendances and future meetings that have not yet taken place.

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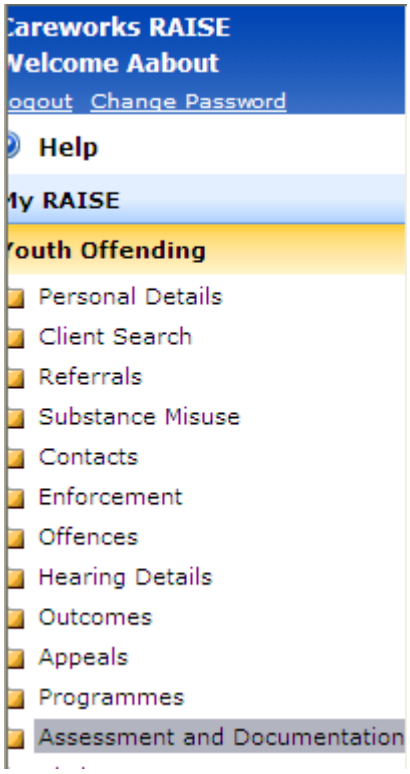
Chapter 10) Assessments and Documentation

This module allows YOT users to record any assessments or documentation in relation to a young person in one single place. It brings together all written material about the young person. It also introduces the concept of a single dynamic and continuous assessment on a young person.

Any local documents required within this module will need to be created by your local administrator using the Document Creator software.

Function

To open Assessments and Documentation identify the icon on the left hand side of the screen:



A single click will open Assessments and Documents.

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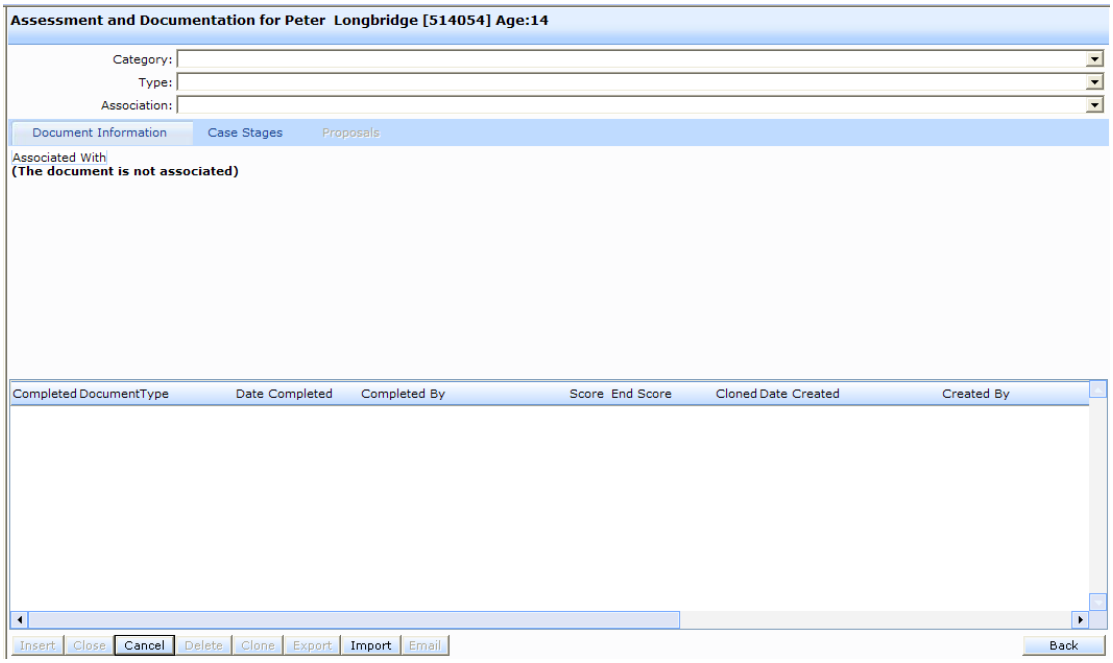
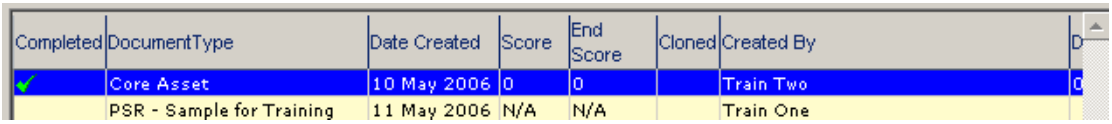


You then have two choices, to identify an existing document you wish to update or create a new document.

Note: It is important that if you choose to update an existing document by the Re-assess button then, with the exception of a Core Asset that has been case staged, the original document will be overwritten. If you need to keep the original then you should use the Clone facility on all documents except Core and Final Warning Assets.

Identifying an Existing Document

You can use the scroll facility on the right hand side to move up and down the document lists. If there a large number of documents then you can sort by clicking on the relevant column head.



Once identified a **double** click on the line will open up the relevant document.

Note: A document that has a green tick in the completed column is **read only**. If you wish to make amendments to that document you will need to highlight the document line and click the Reassess button

.

You will then see the following message:

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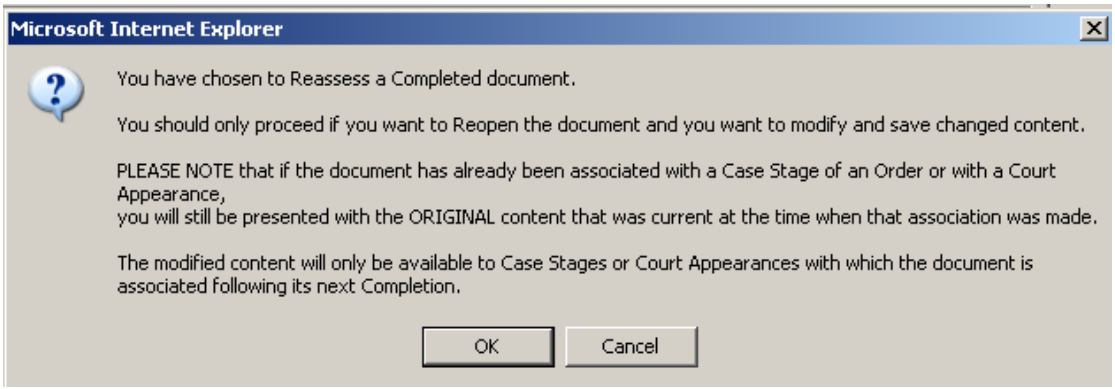
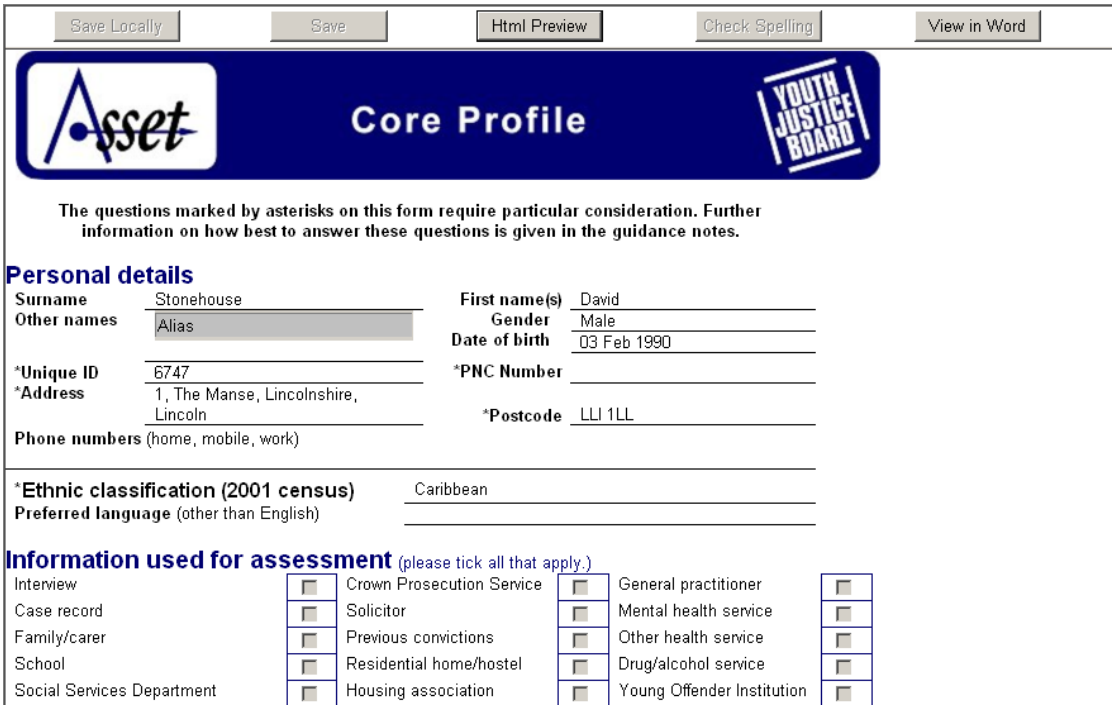

Microsoft Internet Explorer
You have chosen to Reassess a Completed document.
You should only proceed if you want to Reopen the document and you want to modify and save changed content.
PLEASE NOTE that if the document has already been associated with a Case Stage of an Order or with a Court Appearance,
you will still be presented with the ORIGINAL content that was current at the time when that association was made.
The modified content will only be available to Case Stages or Court Appearances with which the document is associated following its next Completion.
OK
Cancel

This is reminding you that you are opening up an existing document and possibly choosing to make changes.

> **Note:** Once opened, the date entry that had the function of locking the document will become blank. All pre-populated fields will be updated for example if the client's address has changed the new address will be displayed.

Clicking on OK at this stage will unlock the document and a double click will allow you to view their chosen document.

For the purposes of this section of the manual our chosen document is a Core Asset.



> **Note:** Once a document is opened it is functioning as an HTML document outside of CareDirector Youth. Therefore it is possible for the application to be timed out without you being aware of the timeout. Consequently you may lose the data you have input to that point. **CareWorks advises all users to constantly save as you work in a document.**

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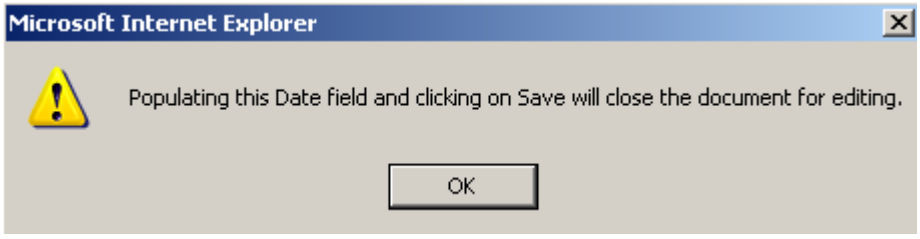
Note: It is possible for you to reopen CareWorks YOT/CareDirector Youth at any time by clicking on the icon on the base of the screen. This allows you to go back into CareWorks if you were looking for a particular piece of information.

If you at any stage enter a date, which has the complete function, and then move to another part of the document you will get the following message;



Essentially the prompt is telling you that if you save and exit with this date box completed you have locked the document.

Once any work has been saved on the document you have the following functions:

Save Locally 	This facility will become active when the document has been exported from CareDirector Youth and you are saving outside of the application. Saving it locally then allows the document to be imported into CareDirector Youth.
Save 	This allows you to save the document.
HMTL Preview 	This allows you to view the document in HTML without the control buttons showing.
Check Spelling 	You can check your spelling. This will check the entire document by default. Words unknown to the dictionary can be added.
View in Word 	This allows you to view the document in Word and save outside of CareWorks if necessary. This is also used to print the document.
Close	This allows you to close the document.

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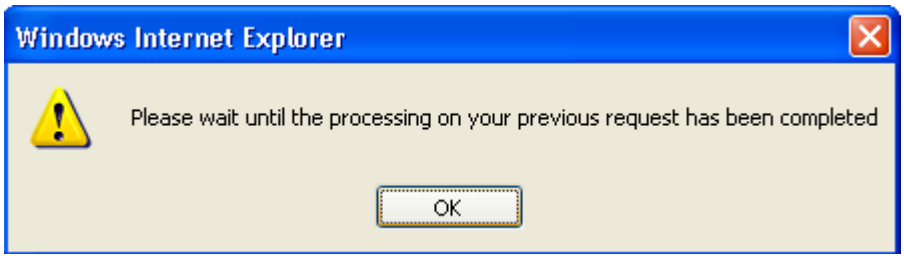
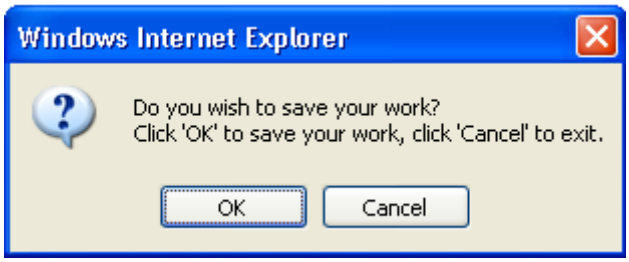
Close	

Please note that if a user first saves and then immediately clicks on close you will see the following prompt.



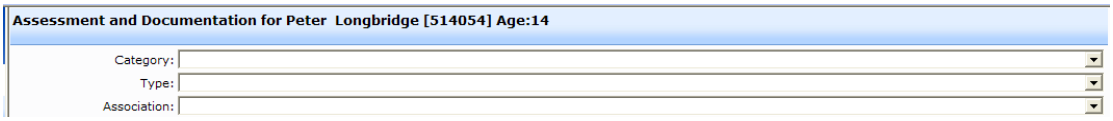
If you attempt to Close a document by clicking on Close before you have saved you will get the following message:



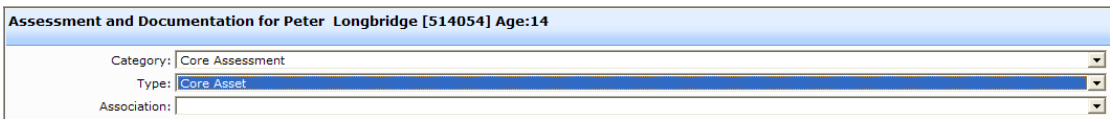
Clicking on Cancel will delete your work.

Create a New Document

Choose a value in the category, this section of the manual we will choose a Core Asset.



This will reveal the Type of document that makes up the category. In our example you have chosen a Core Asset.



You then have to Associate the document with one of the following:

- Referral
- Hearing
- Outcome
- Programme

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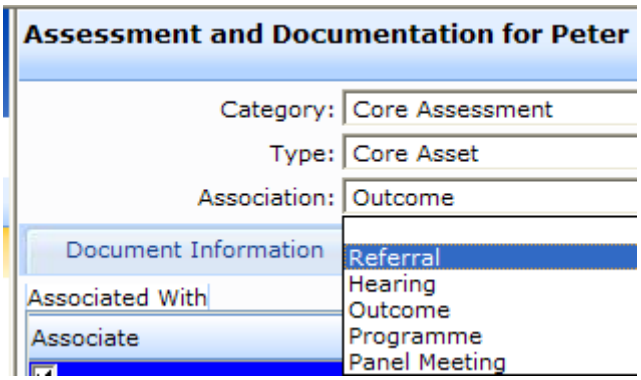
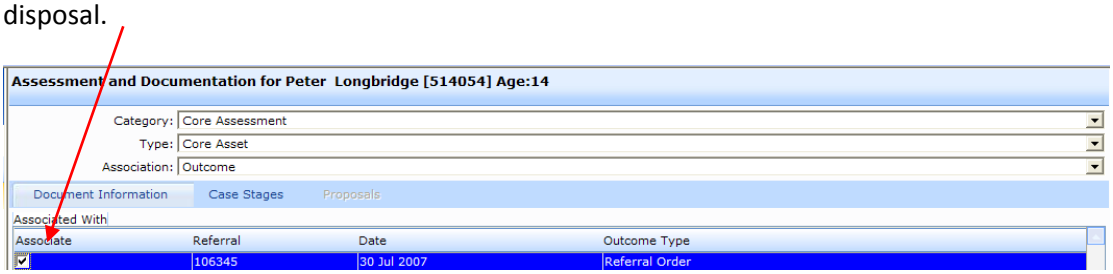
- Panel Meeting



The choice of which value to associate it with depends upon what type of document is being done. For example:

- An ONSET document or any prevention document is likely to be associated with the referral or programme.
- A Final Warning or Core Asset is likely to be associated with the hearing (in the case of a PSR) or the outcome.
- A Referral Order Panel report is likely to be associated with a Panel Meeting.
- A Pre-Sentence Report is likely to be associated with the Sentence Hearing.

Once the association is made the *Document Information* tab will reveal the associations. In our case it will show the outcomes available. You complete the association by ticking the right disposal.



You then click Insert

and the document will appear.

Please note that in the categories Other Report and Panel Report you will be required to fill in a Start Date.

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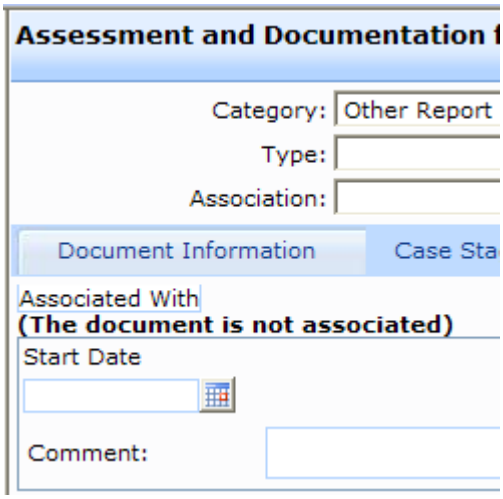
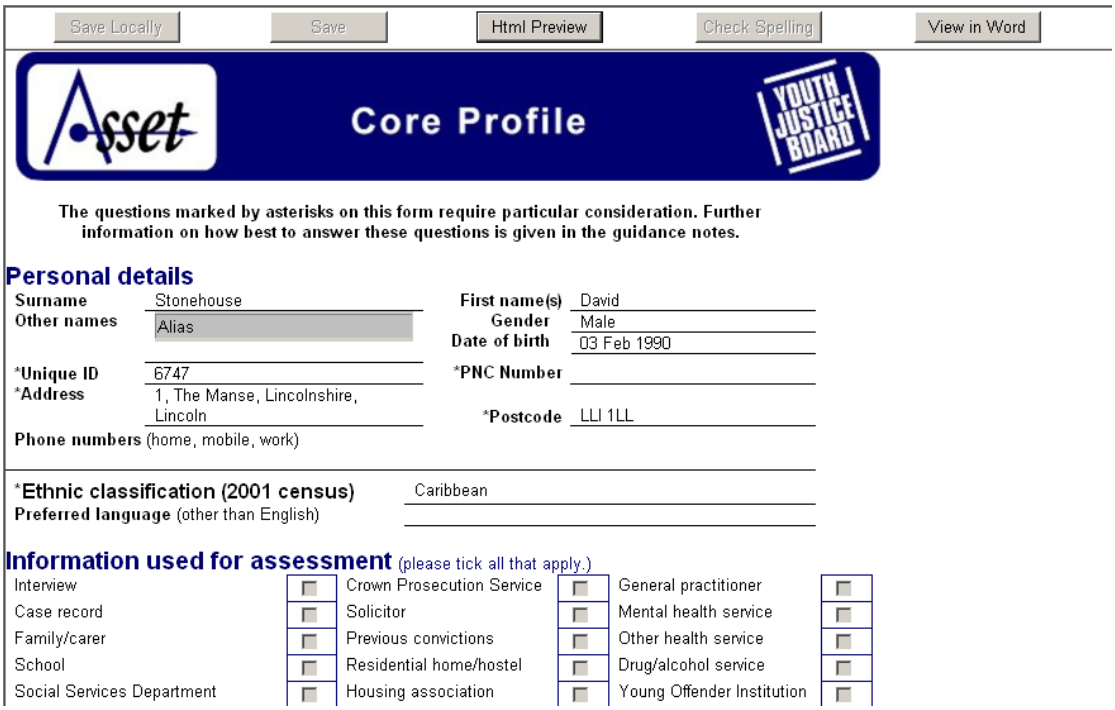


At this stage you will now be viewing your chosen document.



Note: Once a document is opened it is functioning as an HTML document outside of the CareWorks application. Therefore it is possible for the application to be timed out without you being aware of the timeout. Consequently you may lose the data you have input to that point. **CareWorks advises you to constantly save as you work in a document.**

Note: It is possible for you to reopen CareWorks YOT/CareDirector Youth at any time by clicking on the icon on the base of the screen. This allows you to go back into CareWorks if you were looking for a particular piece of information.

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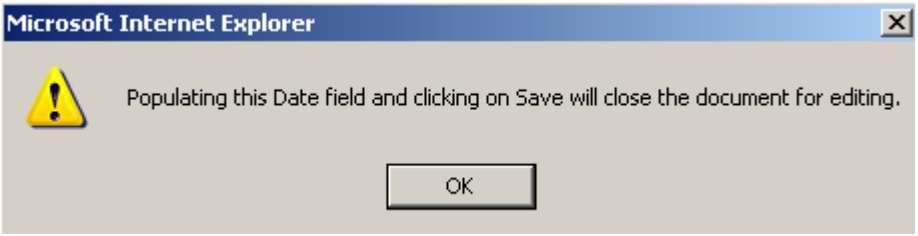
If you at any stage enter a date, which has the completed function, and then move to another part of the document you will get the following message:



Essentially the prompt is telling you that if you save and exit with this date box completed you have locked the document.

Once the work is completed on the document you have the following functions:

Save Locally 	This facility will become active when the document has been exported from CareDirector Youth and you are saving outside of the application. Saving it locally then allows the document to be imported into CareDirector Youth.
Save 	This allows you to save the document.
HMTL Preview 	This allows you to view the document in HTML without the control buttons showing.
Check Spelling 	You can check your spelling. This will check the entire document by default. Words unknown to the dictionary can be added.
View in Word 	This allows you to view the document in Word and save outside of CareWorks if necessary. It is also where you print the document.
Close 	This allows you to close the document.

When you save initially you will be presented with the following message:

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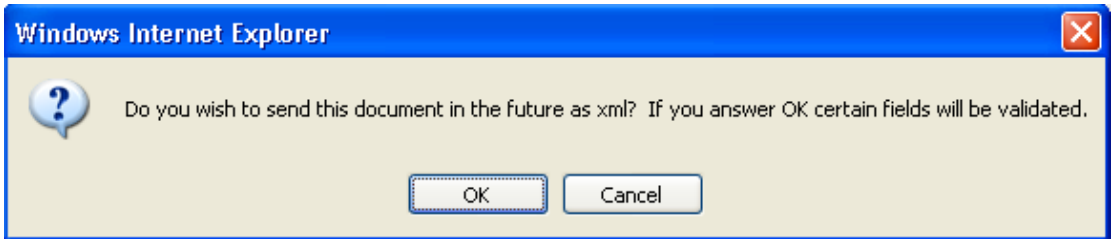
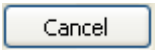

Windows Internet Explorer
Do you wish to send this document in the future as xml? If you answer OK certain fields will be validated.
OK
Cancel

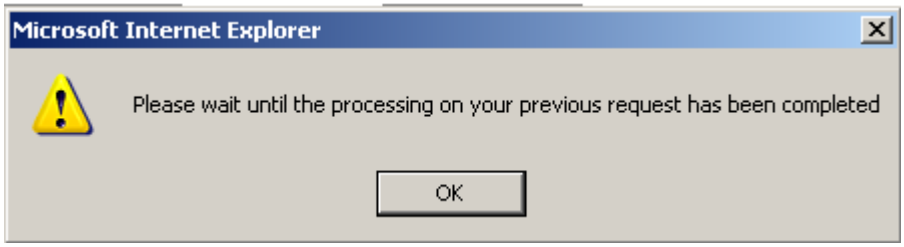
This message is related to electronically dispatching the document to the YJB Placements Unit and is to be utilised when you have a young person who is likely to be remanded or sentenced to custody. If you click OK it will validate before dispatching that you have correct entries in:

- Date of Birth
- Sources of Information
- Vulnerability Section
- Risk of Harm Section
- Completed by
- Completed date

If there is no risk of custody or the document is not yet complete click on 

and the document will be saved in the normal HTML format.

Please note that if a user first saves and then immediately clicks on close you will see the following prompt:



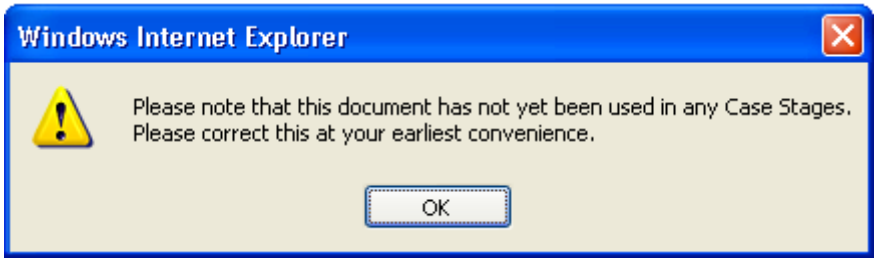
Ascribing Case Stages to a Core Asset

Purpose

The Case Stages tab allows you to attach the right case stage to a Core Asset as these are required for quarterly and annual reporting purposes. This function allows an assessment to be recorded and retained exactly how it was at a particular moment in time. You are then able to view historical documents as they were originally created. In addition you need only create one asset which becomes a continuous assessment that has a 'snapshot' taken of it periodically. In the case of Core Assets you will have the ability to Re-assess a closed document and will **no longer need** to Clone documents.

Function

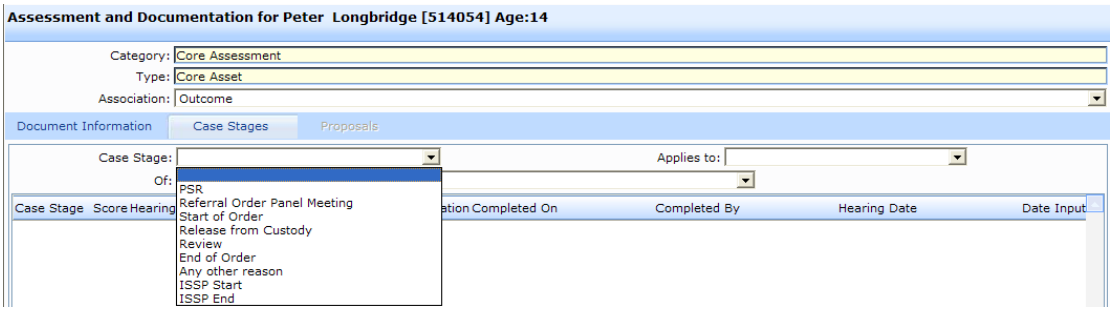
A user selects the Core Asset by highlighting with a single click. If no case stages have been ascribed to the Asset you will see the following prompt:


Windows Internet Explorer
Please note that this document has not yet been used in any Case Stages.
Please correct this at your earliest convenience.
OK

Note: Only documents that have a green tick in the completed column can be given a case stage.

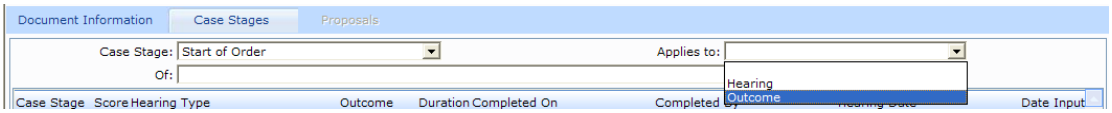
Completed	DocumentType	Date Created	Score	End Score	Cloned	Created By
✓	Core Asset	26 Sep 2006	0	0		Train One

You then click on the Case Stage tab, choose the appropriate Case Stage:

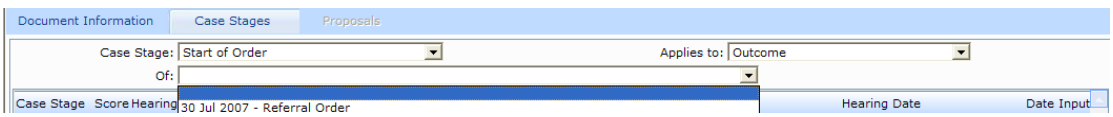


Note: The Start of Order and ISSP Start should be one and the same document unless the YOT and ISSP teams operate separately. In the former the same Asset can be given two case stages whilst in the latter it will be two separate documents. The End of Order and ISSP end are likely to be separate documents unless the Order is a 6 month one.

You proceed to choose what this case stage *Applies To*;



Finally you choose from the drop down list.



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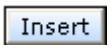
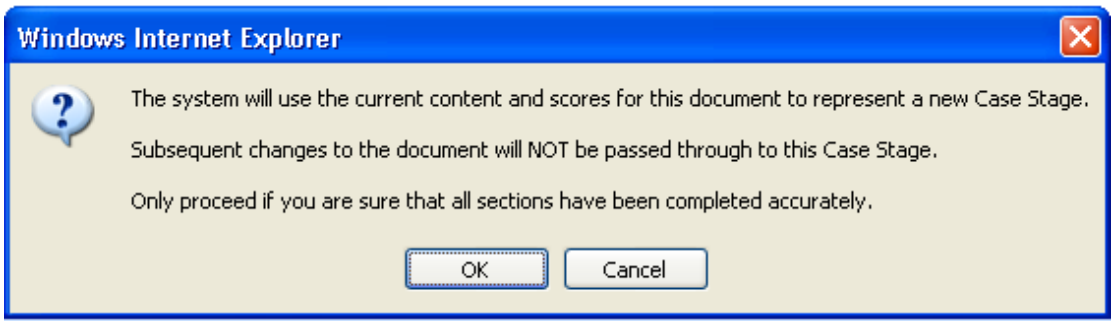
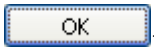
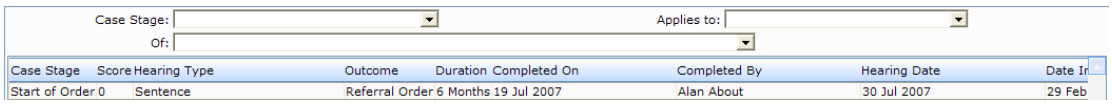
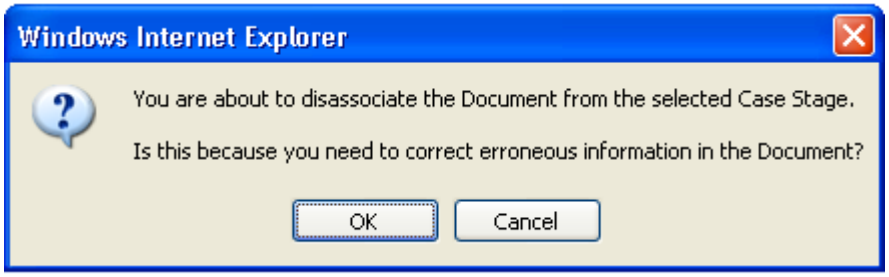
To save the Case Stage you click on Insert  and are presented with the following prompt:



Following clicking of  the case stage is inserted as a gridline:



Within the Case Stage field three functions are available to you:

Delete	When you want to delete a case stage it is either because you have entered the wrong case stage or you need to add information at a later stage that was missing at the time of insertion. CareDirector Youth assumes that it is the latter and when you has highlighted the correct case stage and clicked on Delete the following prompt appears;  Cancel will stop deletion and OK will present you with the following prompt;

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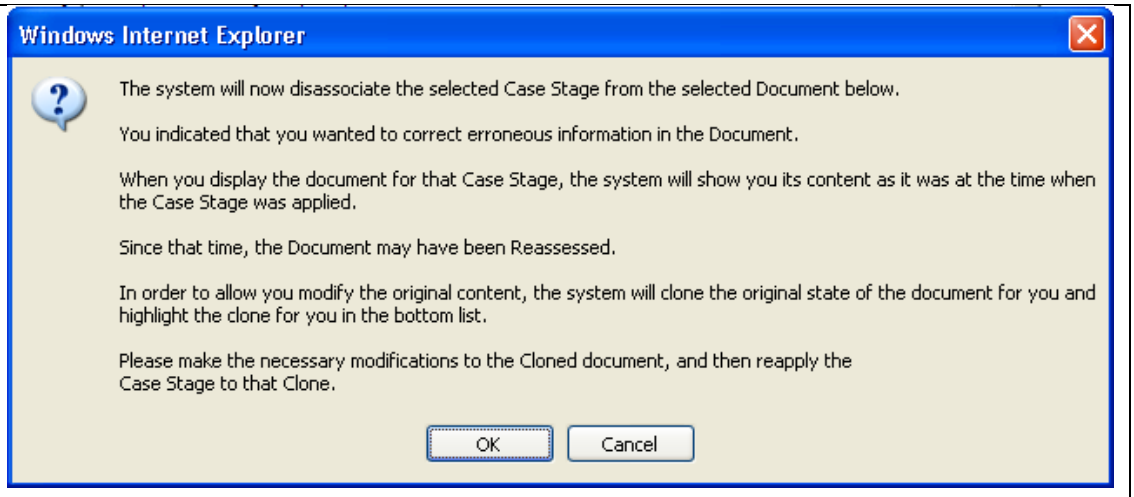
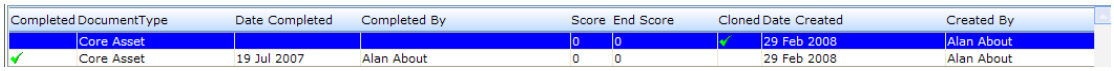

Windows Internet Explorer
The system will now disassociate the selected Case Stage from the selected Document below.
You indicated that you wanted to correct erroneous information in the Document.
When you display the document for that Case Stage, the system will show you its content as it was at the time when the Case Stage was applied.
Since that time, the Document may have been Reassessed.
In order to allow you modify the original content, the system will clone the original state of the document for you and highlight the clone for you in the bottom list.
Please make the necessary modifications to the Cloned document, and then reapply the Case Stage to that Clone.
OK
Cancel

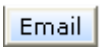
Clicking on OK will launch the original document to allow you to make the amendments required. If none are required fill in the Completed Date to match the original date, click on Save followed by Close. It will show a cloned entry of the original document in the grid.



Completed	DocumentType	Date Completed	Completed By	Score	End Score	Cloned	Date Created	Created By
	Core Asset			0	0	✓	29 Feb 2008	Alan About
✓	Core Asset	19 Jul 2007	Alan About	0	0		29 Feb 2008	Alan About

Having acknowledged this message you can then ascribe the correct stage by undertaking the steps outlined earlier.

E-mail



At certain points it may be necessary to e-mail documents to other agencies such as the Youth Justice Board's Placement Team. The approach you take will depend upon the following:

- Your version of CareDirector Youth is connected to an SMTP server
- Your version of CareDirector Youth is connected to an Web mail server
- You are part of the YJB Connectivity Pilot

Please see section on e-mailing documents.

Ascribing the Next Case Stage

Following the ascribing of the first case stage you may leave the completed Asset until such time as you do a further assessment or immediately re-assess the document so that further assessment can take place.

To re-assess highlight the particular document and click on the

button. The following prompt is displayed:

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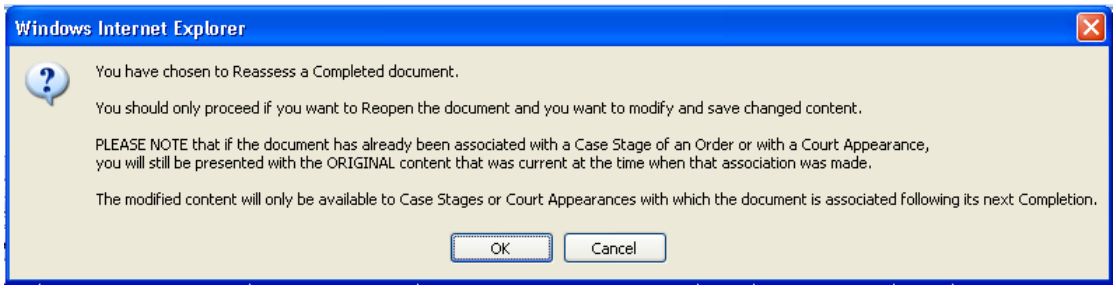
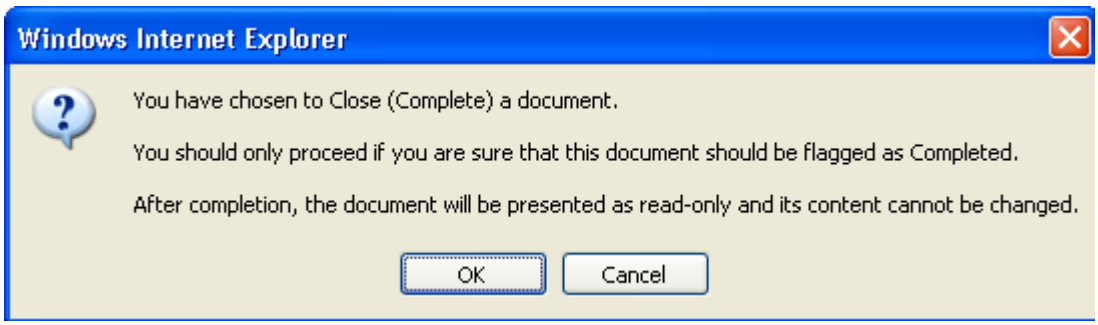

Windows Internet Explorer
You have chosen to Reassess a Completed document.
You should only proceed if you want to Reopen the document and you want to modify and save changed content.
PLEASE NOTE that if the document has already been associated with a Case Stage of an Order or with a Court Appearance, you will still be presented with the ORIGINAL content that was current at the time when that association was made.
The modified content will only be available to Case Stages or Court Appearances with which the document is associated following its next Completion.
OK
Cancel

Clicking *OK* re-opens the Asset in our example, and you can commence the re-assessment.

Note: Once a document has lost its Completed Status then you can 'Lock' that document by using the Close button.

When using this button you will receive the following prompt:


Windows Internet Explorer
You have chosen to Close (Complete) a document.
You should only proceed if you are sure that this document should be flagged as Completed.
After completion, the document will be presented as read-only and its content cannot be changed.
OK
Cancel

Once the work is completed on the document the functions outlined earlier in 'Identifying an Existing Document' are again available.

Once the assessment is completed then the steps outlined in 'Ascribing a Case Stage' can be followed.

Using the Case Stage Functions to Change the Content of an Assessment Document

Description

The route that a young person takes is often complicated and does not follow a set pattern. The two functions of reassess and association allow you to change the contents of their assessment at the moment the young person changes direction. In our example a young person is on a Referral Order and the practitioner has completed their Start of Order Asset. The young person then appears in court for new offences which is adjourned for reports. The practitioner then has to do a new PSR Asset prior to doing their Pre-Sentence Report. The two functions allow the original Start of Order Asset to be utilised for the PSR Asset.

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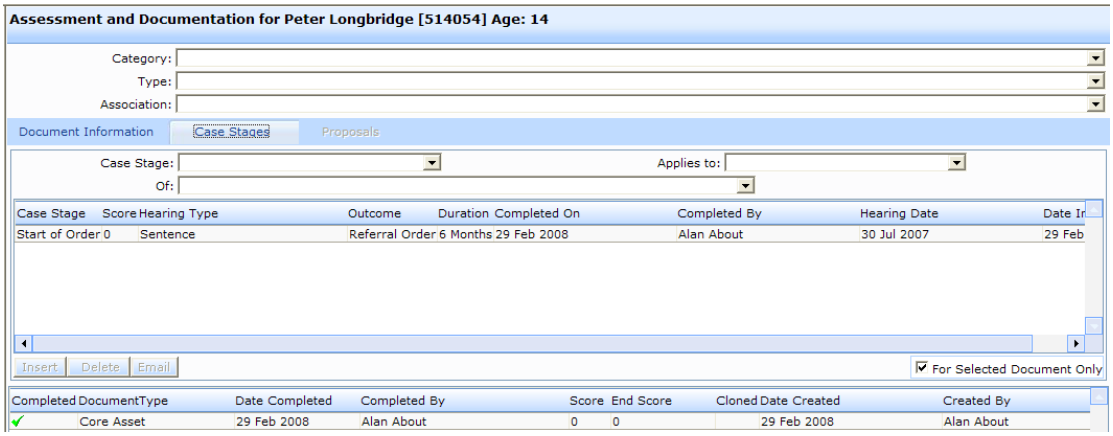
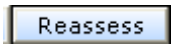
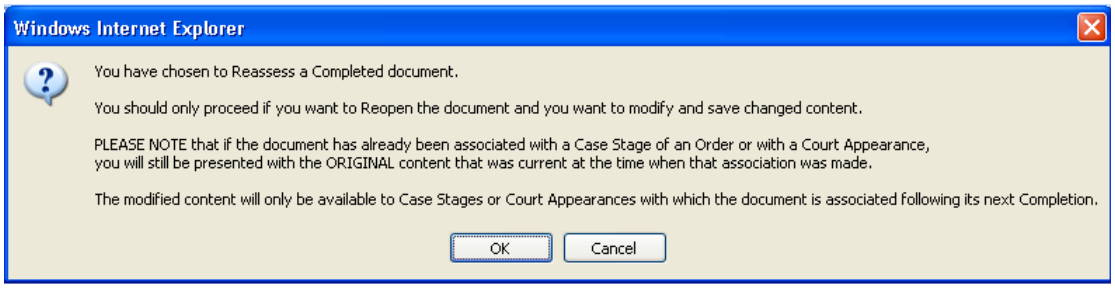
Function

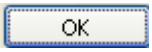
In our example you can see a completed Asset in the bottom box and a Start of Order Asset showing in the Case Stage box.

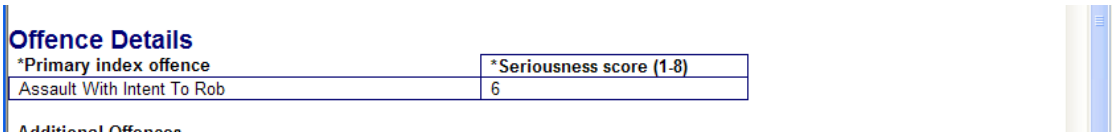

Assessment and Documentation for Peter Longbridge [514054] Age: 14
Category:
Type:
Association:
Document Information
Case Stages
Proposals
Case Stage:
Applies to:
Of:
Case Stage Score Hearing Type Outcome Duration Completed On Completed By Hearing Date Date In
Start of Order 0 Sentence Referral Order 6 Months 29 Feb 2008 Alan About 30 Jul 2007 29 Feb
Insert
Delete
Email
For Selected Document Only
Completed DocumentType Date Completed Completed By Score End Score Cloned Date Created Created By
Core Asset 29 Feb 2008 Alan About 0 0 29 Feb 2008 Alan About

The young person then commits more offences, appears in court and it is adjourned for reports. You are now required to do a PSR Asset and wish to use the Asset highlighted above in dark blue.

You highlight the Core Asset and click on the  button. This will open up the following prompt:


Windows Internet Explorer
You have chosen to Reassess a Completed document.
You should only proceed if you want to Reopen the document and you want to modify and save changed content.
PLEASE NOTE that if the document has already been associated with a Case Stage of an Order or with a Court Appearance, you will still be presented with the ORIGINAL content that was current at the time when that association was made.
The modified content will only be available to Case Stages or Court Appearances with which the document is associated following its next Completion.
OK
Cancel

You click on  which will open the Asset. You will notice at this stage that the offences within the Asset still relate to the original Referral Order:



Please ignore this as these will change to the correct offence/s when you ascribe the new PSR Case Stage.

Make the necessary changes and then date, save and close the document. Once the document is completed and you have the green tick you can ascribe the new case stage, as outlined earlier:

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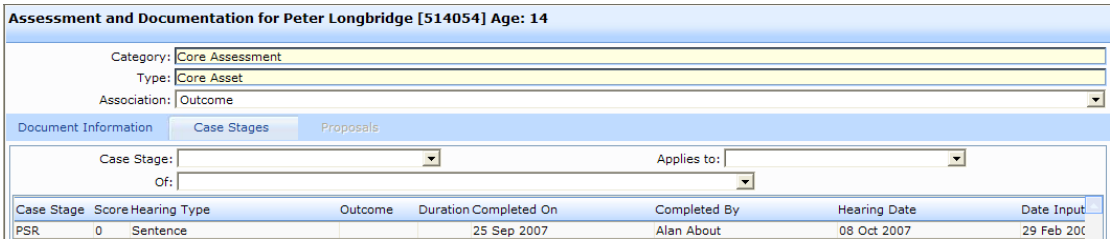
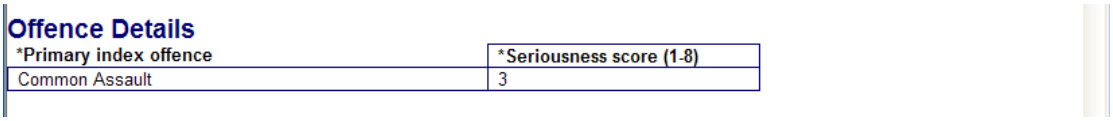

Assessment and Documentation for Peter Longbridge [514054] Age: 14
Category: Core Assessment
Type: Core Asset
Association: Outcome
Document Information
Case Stages
Proposals
Case Stage:
Applies to:
Of:
Case Stage Score Hearing Type Outcome Duration Completed On Completed By Hearing Date Date Input
PSR 0 Sentence 25 Sep 2007 Alan About 08 Oct 2007 29 Feb 20

Ascribing that case stage will change the offence/s to the correct ones:



The ascribing of a case stage will always put in the correct offences. So in this example, if you returned to Core Asset to re-assess for the End Order case stage for the original Referral Order and then ascribed the right case stage it will remove the offence/s related to the PSR Asset and put in the offence/s related to the original Referral Order.

Completing a Pre-Sentence Report

Purpose

This functionality allows you to construct a pre-sentence report, record the proposal and if the young person is ISSP eligible, but a proposal is being made that does not include ISSP, to record why ISSP is not being proposed.

Function

You click on the Assessment and Documentation icon on the left hand side to open up the screen:

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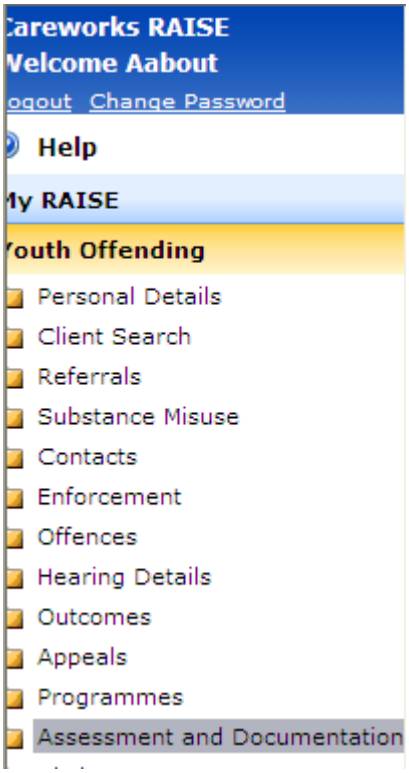
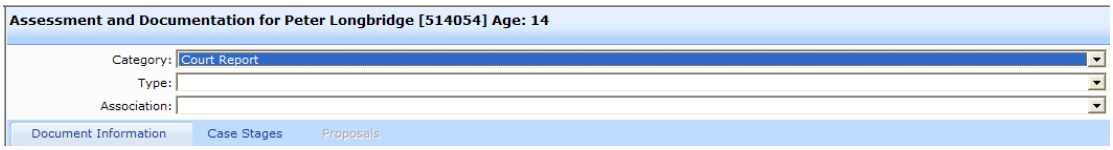
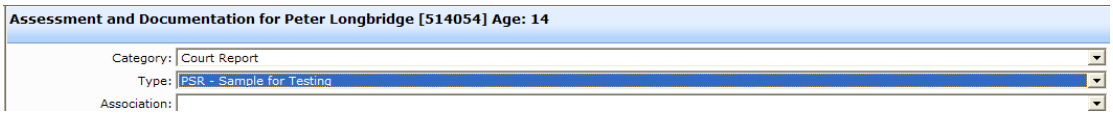


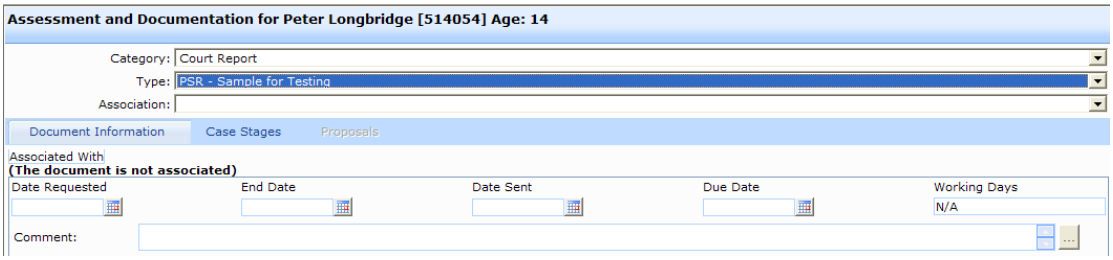
You choose the *Category* under which the pre-sentence report has been inserted:



You would then choose under Type the name of your local Pre-Sentence Report:


Assessment and Documentation for Peter Longbridge [514054] Age: 14
Category: Court Report
Type: PSR - Sample for Testing
Association:

Once these are chosen you will see a change to the screen as outlined below:



You then choose from Association the value of Hearing and proceed then to tick the appropriate hearing where your report will be considered:

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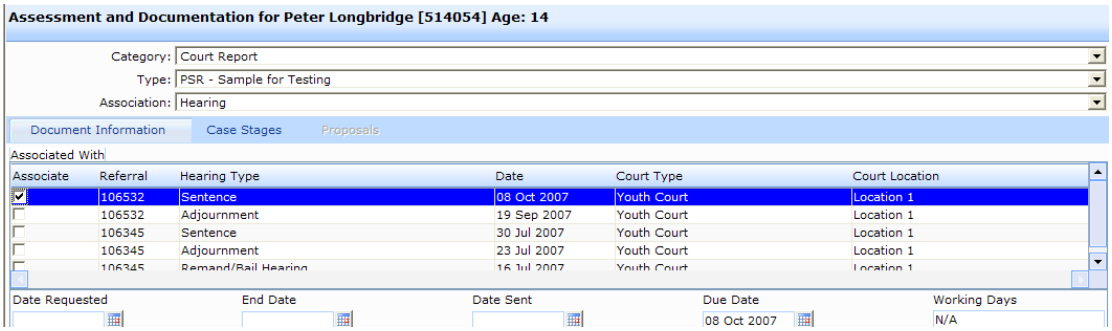
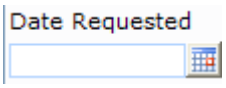
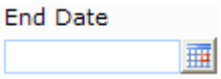
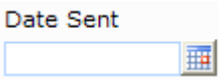
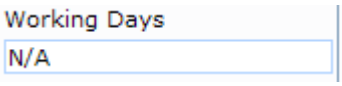


The fields within the Document Information should be filled in as follows:

Date Requested 	This is the date that the court requested the report be written by the YOT. In most cases it will be the adjournment hearing that precedes the sentence hearing.
End date 	This is the date on which you completed the report and it was ready to go to court.
Date Sent 	This is the date it was dispatched to court.
Due date 	This is the date when the report will be used.
Working Days 	This records the number of working days taken to complete the report. It is calculated by looking at the number of working days from the requested date to the end date.
Comments 	This allows you to record any relevant comments such as the fact that the report has been checked.

The completed fields should be as follows

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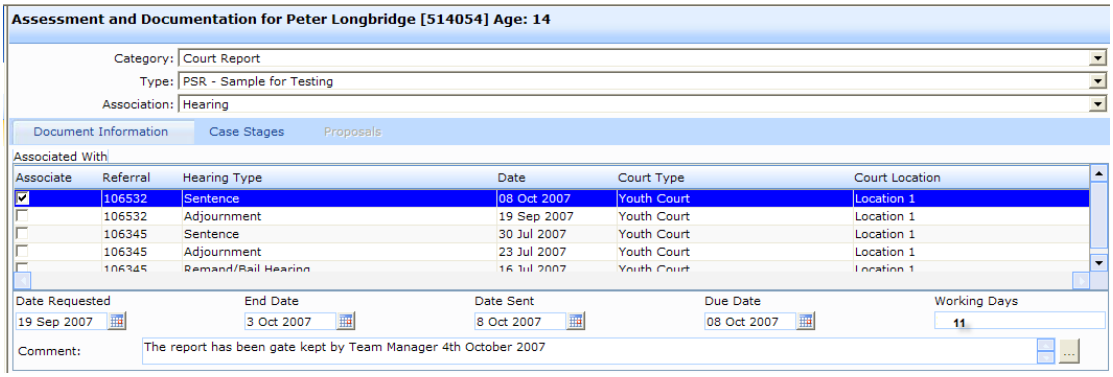
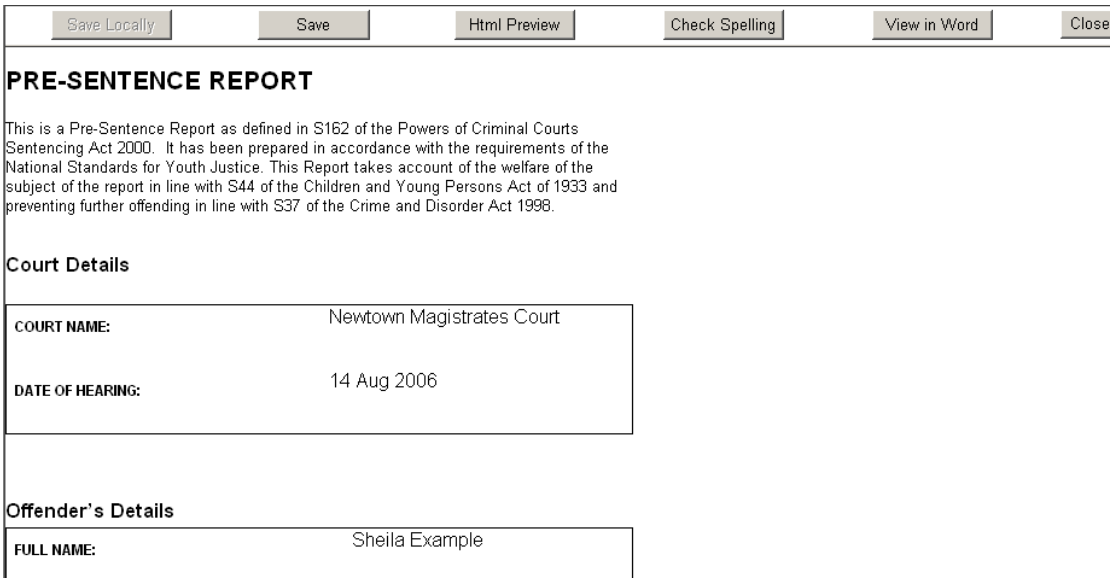
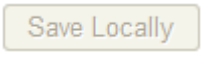
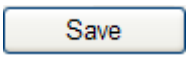
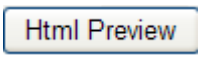
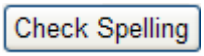
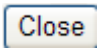


Once these fields are completed you click on and this will open the report:

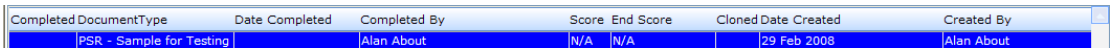

Save Locally
Save
Html Preview
Check Spelling
View in Word
Close
PRE-SENTENCE REPORT
This is a Pre-Sentence Report as defined in S162 of the Powers of Criminal Courts Sentencing Act 2000. It has been prepared in accordance with the requirements of the National Standards for Youth Justice. This Report takes account of the welfare of the subject of the report in line with S44 of the Children and Young Persons Act of 1933 and preventing further offending in line with S37 of the Crime and Disorder Act 1998.
Court Details
COURT NAME:
Newtown Magistrates Court
DATE OF HEARING:
14 Aug 2006
Offender's Details
FULL NAME:
Sheila Example

You then complete the report and have the facility for the following functions:

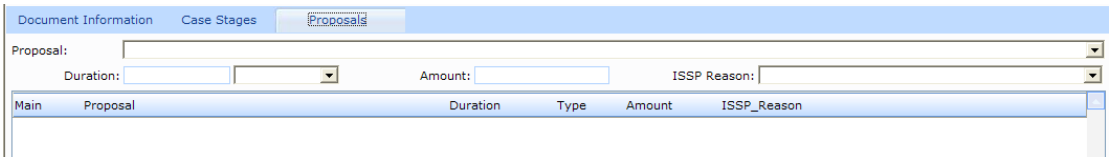
Save Locally 	This facility will become active when the document has been exported from CareDirector Youth and you are saving outside of the application. Saving it locally then allows the document to be imported into CareDirector Youth.
Save 	This allows you to save the document.
HMTL Preview 	This allows you to view the document in HTML without the control buttons showing.

Check Spelling 	You can check your spelling. This will check the entire document by default. Words unknown to the dictionary can be added.
View in Word 	This allows you to view the document in Word and save outside of CareWorks YOT if necessary. When viewing the document as Word you are then able to print for court purposes.
Close 	This allows you to close the document.

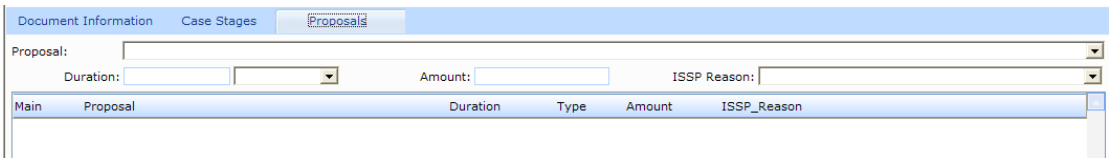
When you save and close the report it will appear as a line in the grid:


Completed DocumentType Date Completed Completed By Score End Score Cloned Date Created Created By
PSR - Sample for Testing Alan About N/A N/A 29 Feb 2008 Alan About

You then need to highlight the line by a single click and click on the Proposal tab. The following will appear:

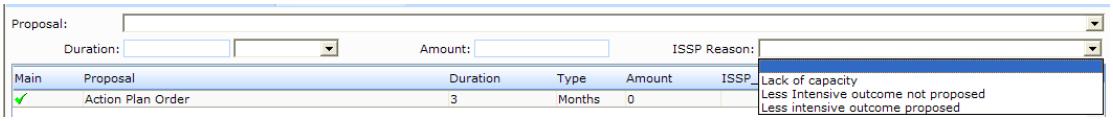


You will record in the Proposal tab the proposal that you have outlined as part of your report. You will then record a nominal duration based on your proposal:

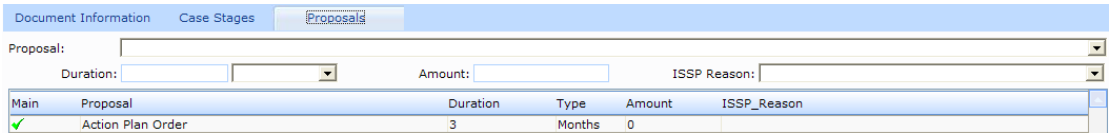


Please note that next to the Cancel button you will see a message in either blue or red that indicates that the young person is or is not ISSP eligible:

In those instances where the young person is ISSP eligible and you are not proposing ISSP as part of their proposal you can record the reason you are not proposing ISSP:



Once this is done you click on the Insert button and the proposal will appear as a line in the Proposal box:



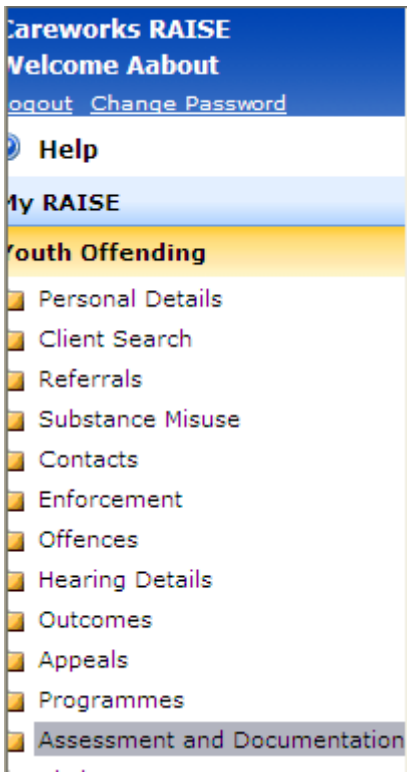
Note: When viewing in Word please remember that any changes you make **will not** be saved within the original HTML version inside the application. CareWorks advises that the only changes made to any report should be those relating to layout.

Recording a Bail Proposal

This allows you to record bail proposals, normally for ISSP, that are made at various hearings. In this case the young person has been remanded in custody and at their hearing and subsequent hearings the Bail or ISSP team present the court with a bail option as opposed to further remands in custody.

Function

You click on the Assessment and Documentation icon on the left hand side to open up the screen:



You choose the Category of Other Report:

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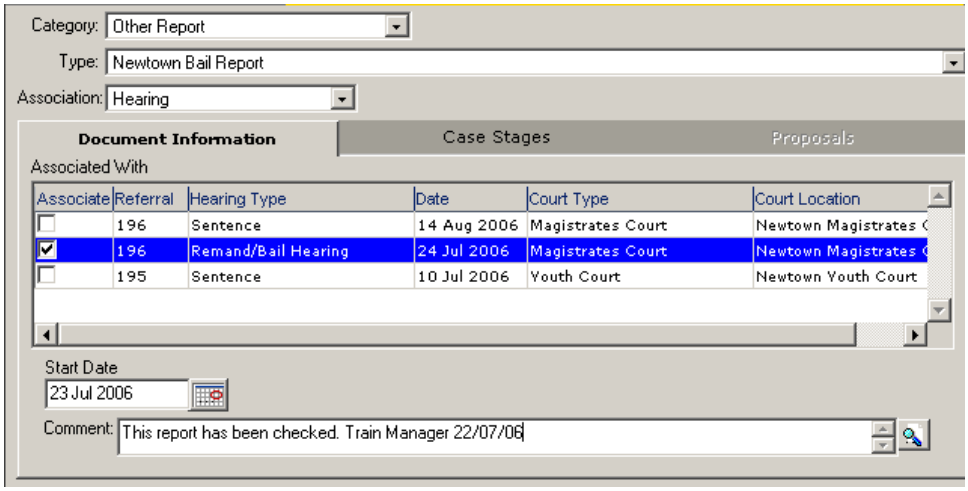
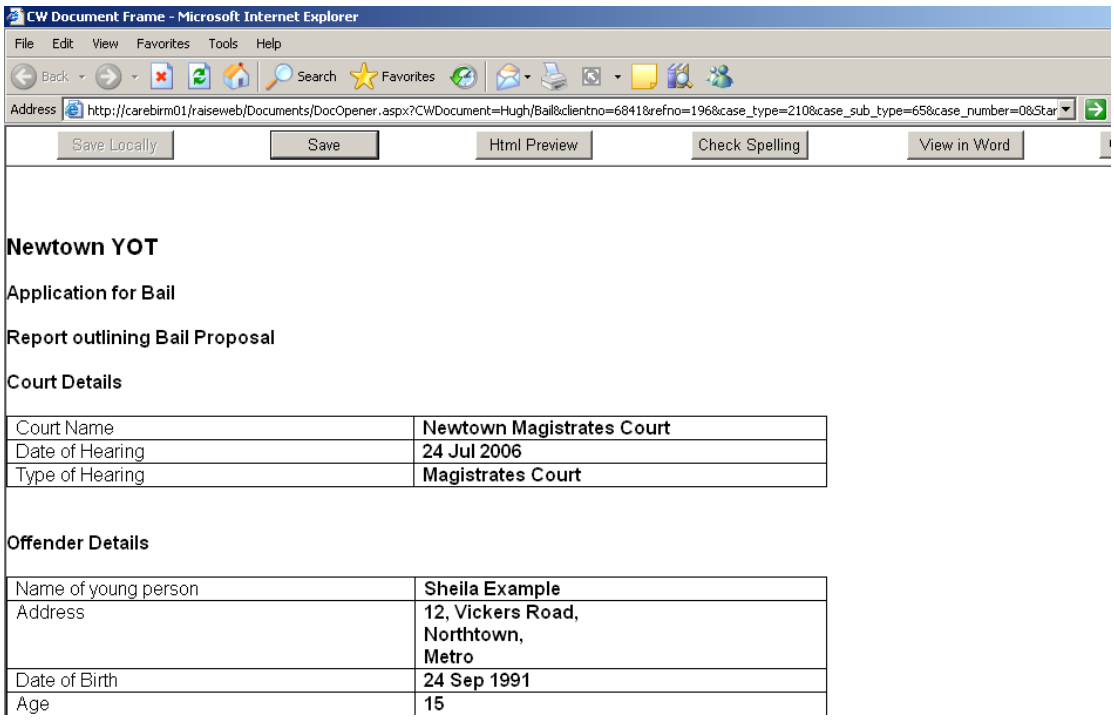
You would then choose under *Type* the name of your local Bail Report:

You then choose from Association the value of Hearing and proceed then to tick the appropriate hearing where their bail report will be considered:



You then click on Insert which will open up the report;



Newtown YOT

Application for Bail

Report outlining Bail Proposal

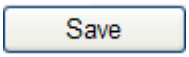
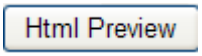
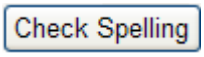
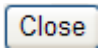
Court Details

Court Name	**Newtown Magistrates Court**
Date of Hearing	**24 Jul 2006**
Type of Hearing	**Magistrates Court**

Offender Details

Name of young person	**Sheila Example**
Address	**12, Vickers Road, Northtown, Metro**
Date of Birth	**24 Sep 1991**
Age	**15**

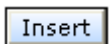
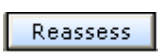
You complete the report and have the facility for the following functions:

Save Locally 	This facility will become active when the document has been exported from CareDirector Youth and you are saving outside of the application. Saving it locally then allows the document to be imported into CareDirector Youth.
Save 	This allows you to save the document.
HMTL Preview 	This allows you to view the document in HTML without the control buttons showing.
Check Spelling 	You can check your spelling. This will check the entire document by default. Words unknown to the dictionary can be added.
View in Word 	This allows you to view the document in Word and save outside of CareWorks YOT if necessary. When viewing the document as Word you are then able to print for court purposes.
Close 	This allows you to close the document.

Note: You should record each a Bail Proposal each time you make an application to court. For example if a young person is Remanded in Custody and at each remand hearing the YOT make an application for ISSP Bail then each application should be recorded.

Additional Functions

Within the assessments and documentation screen there are a number of buttons that assist you.

Insert 	This allows you to insert the selected document.
Update 	Once inserted this allows you to update any changes to the document content or its association. For example a Final Warning Asset that was associated initially with a referral has the association changed to the disposal or programme.
Reassess 	This allows you to re-open completed documents for amendments or new assessments. This button is only available when a closed document has been selected.

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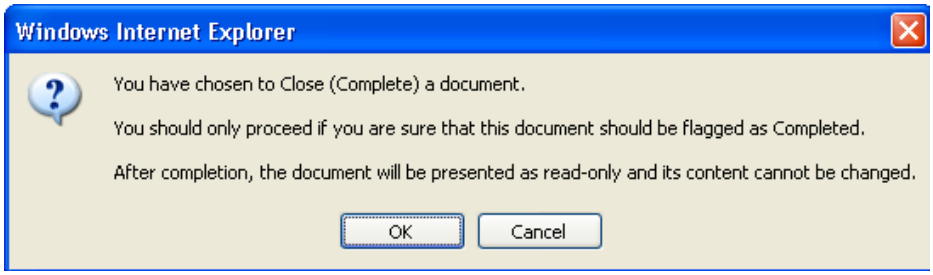
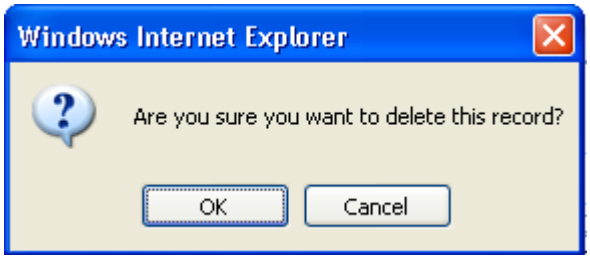
Close Close	This allows you to close any selected document that does not have a completed date. You will be presented with the following prompt. 
Cancel Cancel	This clears down the current selection. It does not delete the selection.

Delete Delete	This button allows you to delete a selected document. You will be presented with the following prompt.  **Any deleted document cannot be recovered.**
Clone Clone	This allows you to create another document as a copy and make the necessary alterations. An example is an appointment letter where another appointment has been offered but the content remains the same. It has been disabled as a function for Onsets, Final Warnings and Core Assets as users will use the *Re-assess* function.
Export Export	This allows you to export the document and make it available outside of CareWorks YOT.
Import Import	This allows you to import a previously exported document into CareWorks YOT.

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E-mail Email	At certain points it may be necessary to e-mail documents to other agencies such as the Youth Justice Board's Placement Team. The approach you take will depend upon the following: • Your version of CareDirector Youth is connected to an SMTP server • Your version of CareDirector Youth is connected to an Web mail server • You are part of the YJB Connectivity Pilot Please see Section on e-mailing documents.
XML	To be added once Connectivity is established nationally.

Exporting **and Importing Documents**

Description

The Export process allows you to save the Assessment document, outside of CareDirector Youth, so that the document can be updated off-line. Once the Assessment is exported, it is marked as **Checked Out** to the exporting user, and no more changes can be made to that document within the CareDirector Youth system. The exporting user will update the Assessment offline and then **Import** it back into CareDirector Youth. At that point it will become freely available to all system users for updating.

Function

You search for the Assessment, as previously described. When the Assessment is displayed on the screen, the Export button is pressed, causing a Save dialog box to be displayed, as shown below:

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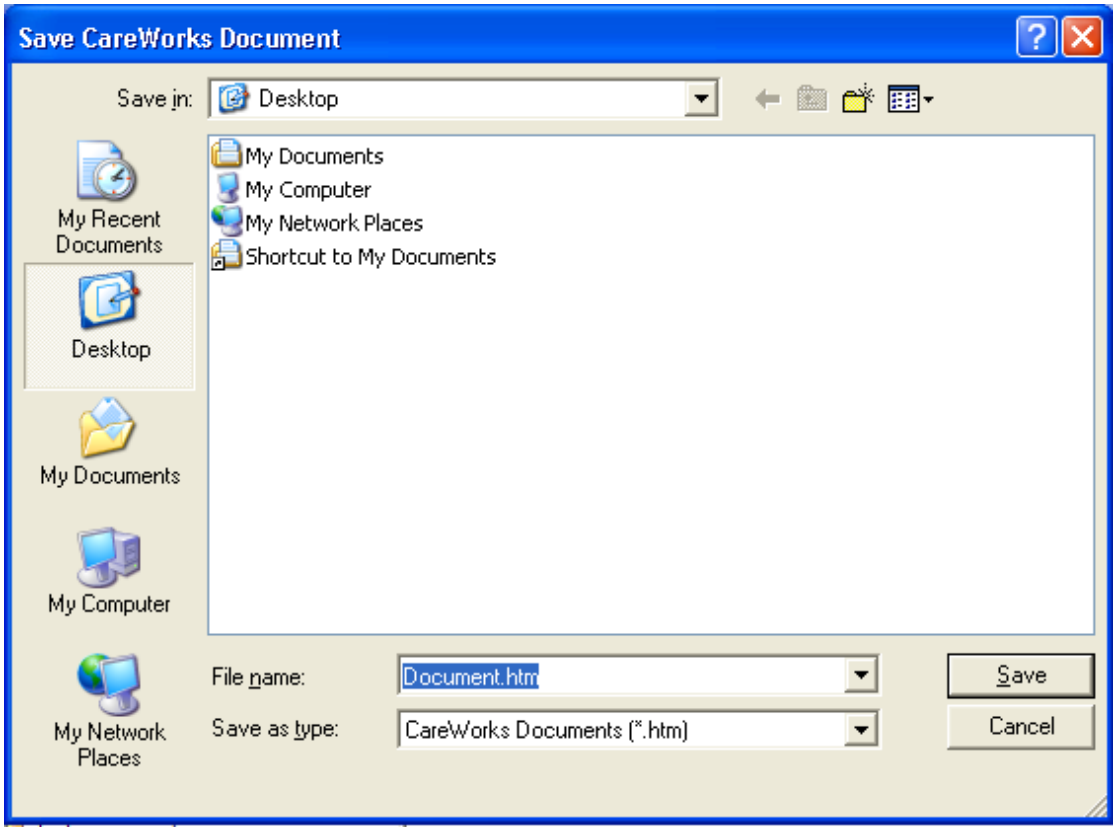

A location and file name are chosen for the Assessment and the Save button is pressed. You will then be informed:

You may the open the exported document

offline and complete all relevant details:

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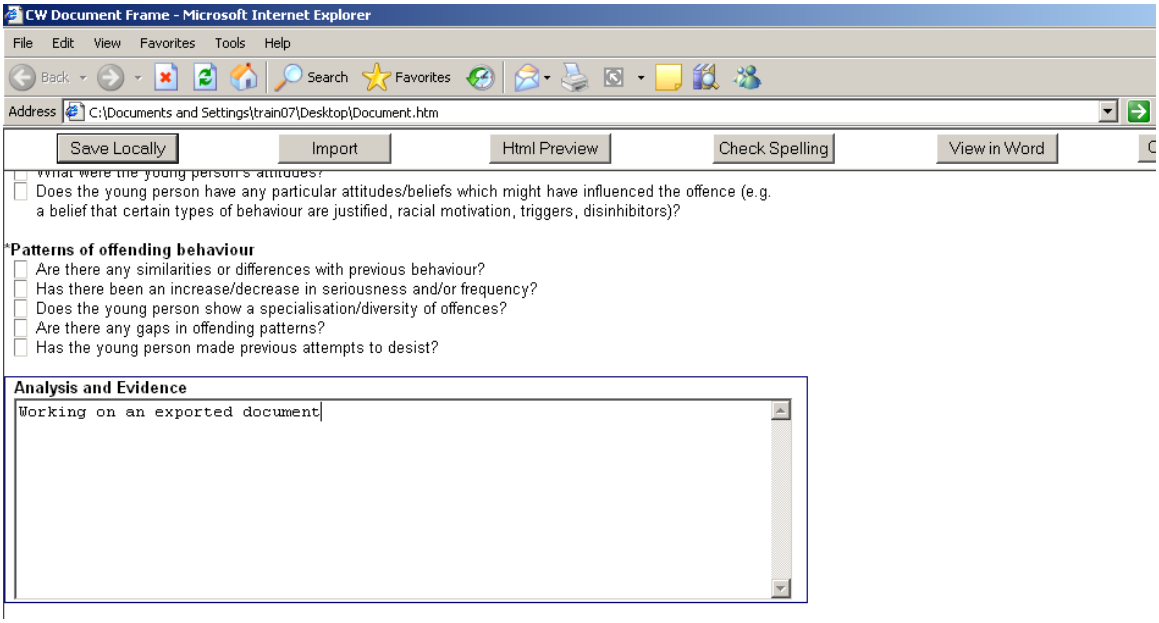
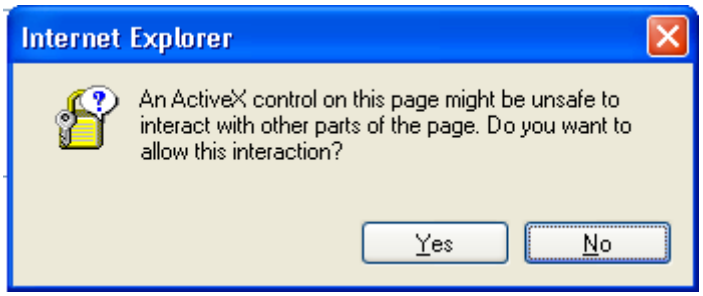
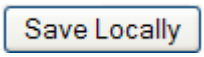

CW Document Frame - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address C:\Documents and Settings\train07\Desktop\Document.htm
Save Locally
Import
Html Preview
Check Spelling
View in Word
Does the young person have any particular attitudes/beliefs which might have influenced the offence (e.g. a belief that certain types of behaviour are justified, racial motivation, triggers, disinhibitors)?
*Patterns of offending behaviour
Are there any similarities or differences with previous behaviour?
Has there been an increase/decrease in seriousness and/or frequency?
Does the young person show a specialisation/diversity of offences?
Are there any gaps in offending patterns?
Has the young person made previous attempts to desist?
Analysis and Evidence
Working on an exported document

When working offline in this way, the Save button is no longer available, and you save changes using the **Save Locally** button.

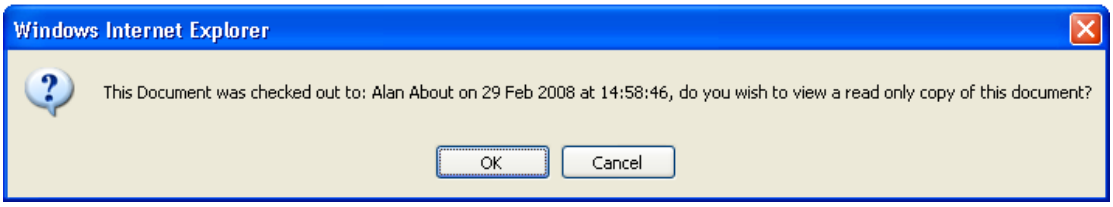
If you get the following message click on Yes:


Internet Explorer
An ActiveX control on this page might be unsafe to interact with other parts of the page. Do you want to allow this interaction?
Yes
No

The 

button should be pressed regularly while working offline to ensure that changes are saved as you are entered.

If another user attempts to open an exported document from within the CareDirector Youth application you get the following prompt.

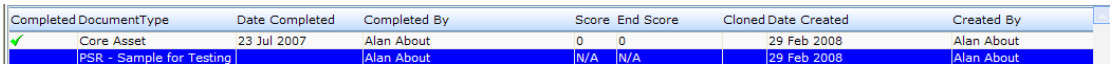

Windows Internet Explorer
This Document was checked out to: Alan About on 29 Feb 2008 at 14:58:46, do you wish to view a read only copy of this document?
OK
Cancel

Import Function

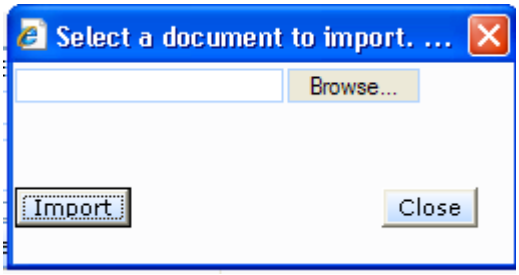
Once changes are made to the exported document, the document must be imported to bring it back into CareDirector Youth to make it available to all users.

When you are logged into CareDirector Youth, you should go to the Assessments and Documentation and select the relevant document as described previously. There is an Import button available on the Document Details screen, which will prompt you to locate the offline document and **Import** it back into CareDirector Youth.

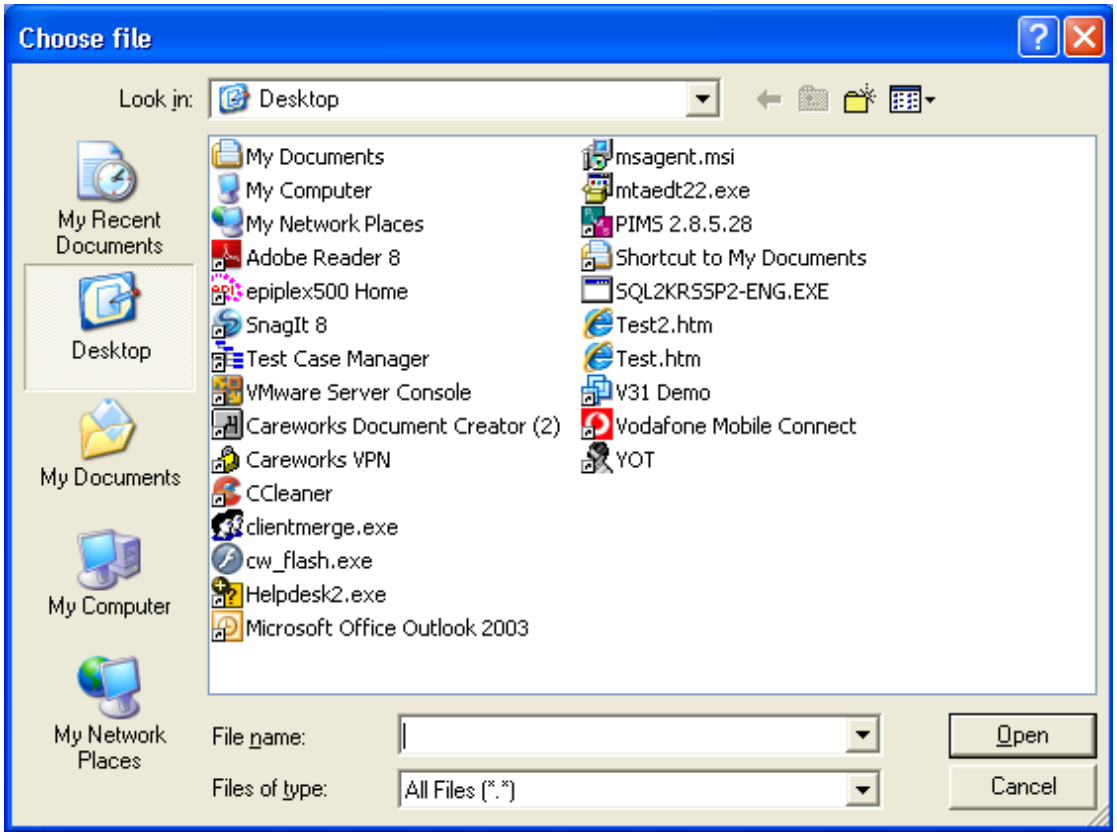
Highlight the document you want to import back into CareDirector Youth:


Completed DocumentType Date Completed Completed By Score End Score Cloned Date Created Created By
Core Asset 23 Jul 2007 Alan About 0 0 29 Feb 2008 Alan About
PSR - Sample for Testing Alan About N/A N/A 29 Feb 2008 Alan About

Click on the Import button and the following screen will appear:



Click on Browse to find you document:



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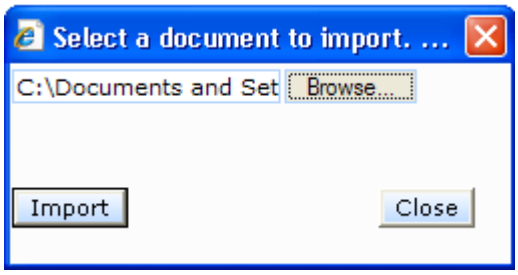
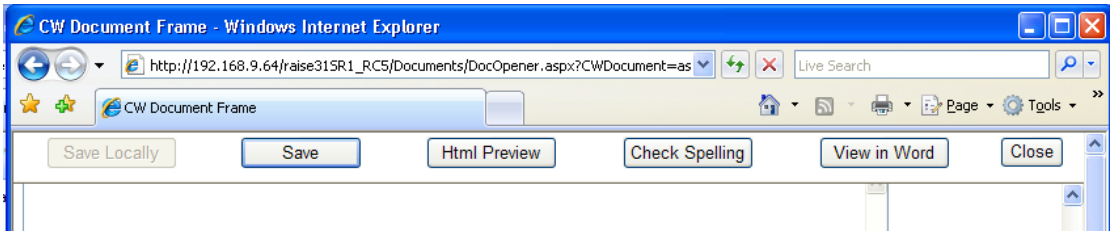
Highlight the file you want to import and click on Open. It will appear as a truncated line next to Browse:



Click on Import and it will open up the document. You then need to save it and close it within CareDirector Youth:



The document will now be viewable with the changes that you made when the document was outside of the application.

Sending Assets and Other Documents via Secure Email

Introduction

The approach you take will depend upon the following:

- Your version of CareDirector Youth is connected to an SMTP server
- Your version of CareDirector Youth is connected to an Web mail server
- You are part of the YJB Connectivity Pilot

SMTP Server

You select the asset/document you wish to send in the Assets/Documents grid:

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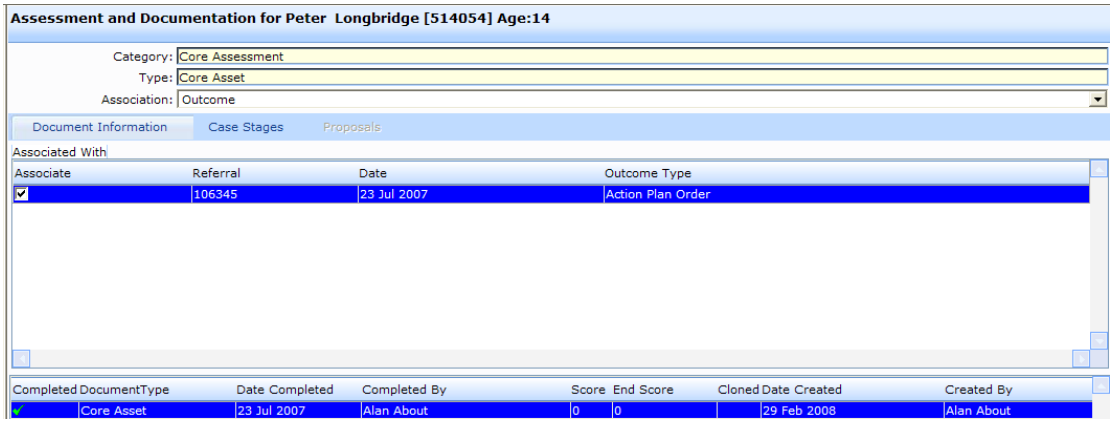
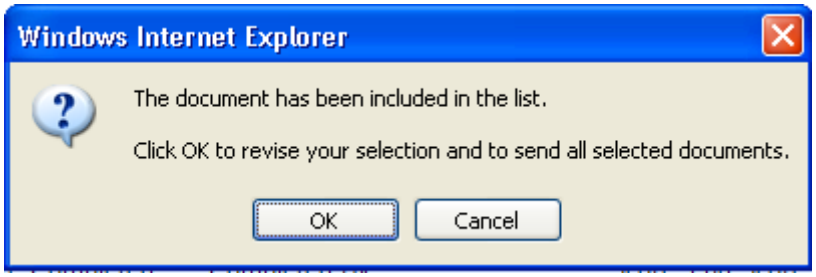
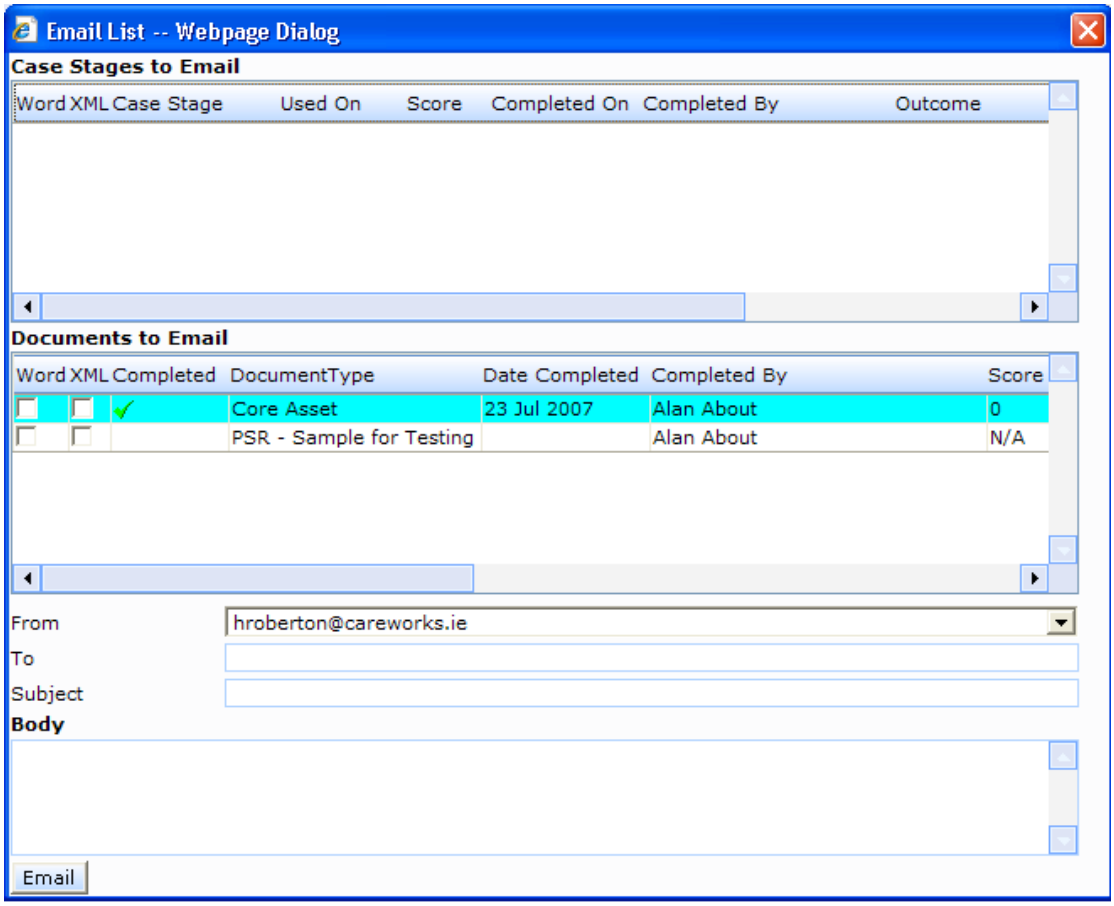


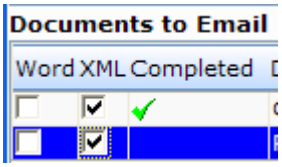
Click the Email button. This launches the following message:


Windows Internet Explorer
The document has been included in the list.
Click OK to revise your selection and to send all selected documents.
OK
Cancel

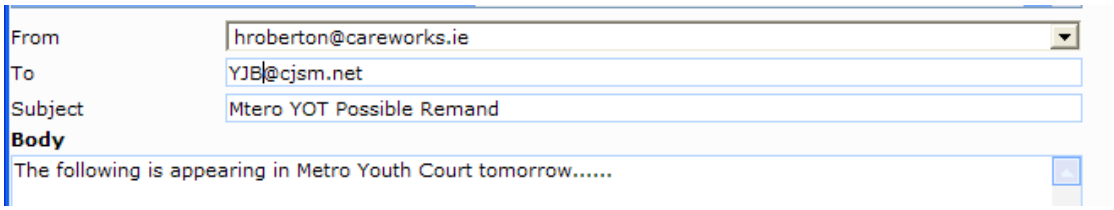
If you need to select additional documents, click the and select another asset/document in the list and then click the Email button again. When you have selected the final document you want to send instead of the button click on OK. The following will appear:



Select the format you want to send for each document by selecting the relevant check box beside each document in the documents to email grid:



Fill in the 'To', Subject and Body fields. This will then enable the e-mail button:



Click the email button. This will display a message stating that the system is generating the documents you wish to send:

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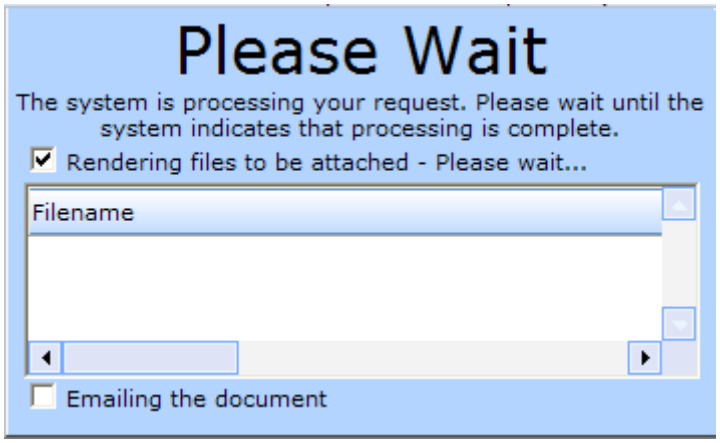
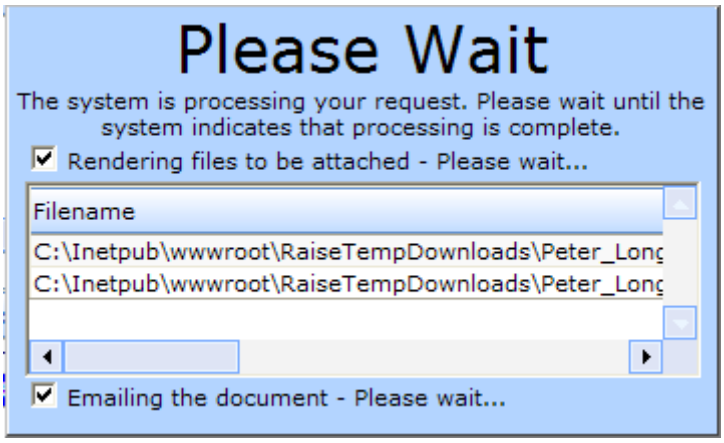
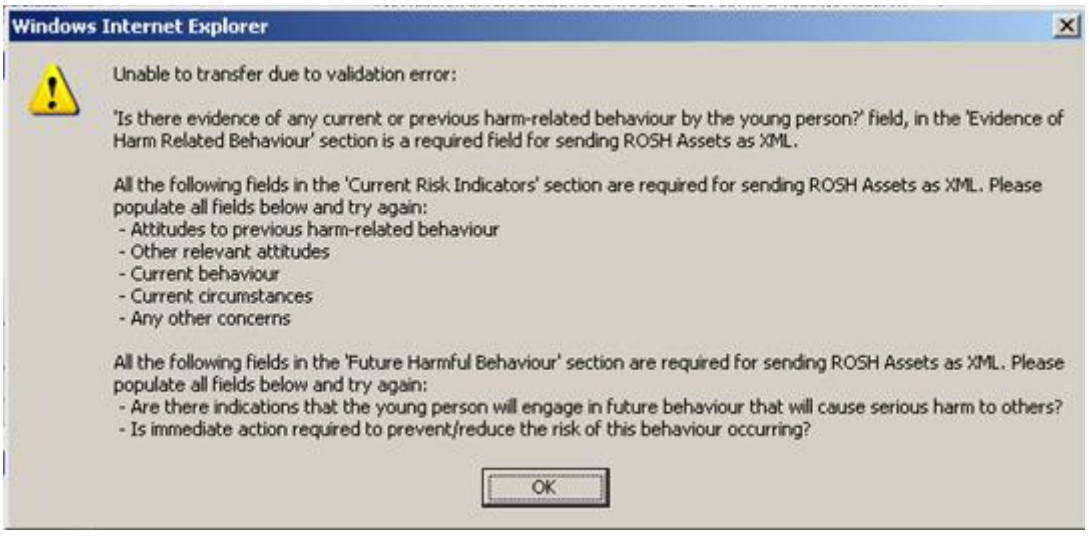

Please Wait
The system is processing your request. Please wait until the system indicates that processing is complete.
Rendering files to be attached - Please wait...
Filename
Emailing the document

The message will change as the documents are e-mailed:

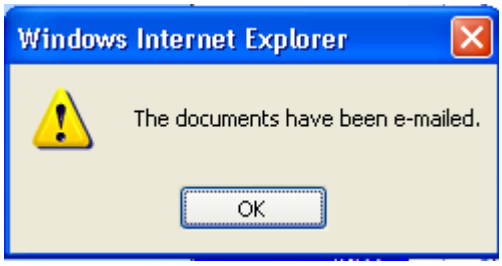

Please Wait
The system is processing your request. Please wait until the system indicates that processing is complete.
Rendering files to be attached - Please wait...
Filename
C:\Inetpub\wwwroot\RaiseTempDownloads\Peter_Long
C:\Inetpub\wwwroot\RaiseTempDownloads\Peter_Long
Emailing the document - Please wait...

If you have not filled in all the required fields you will get a validation error message stating the fields you need to complete in order to send the asset/document via secure email:


Windows Internet Explorer
Unable to transfer due to validation error:
'Is there evidence of any current or previous harm-related behaviour by the young person?' field, in the 'Evidence of Harm Related Behaviour' section is a required field for sending ROSH Assets as XML.
All the following fields in the 'Current Risk Indicators' section are required for sending ROSH Assets as XML. Please populate all fields below and try again:
- Attitudes to previous harm-related behaviour
- Other relevant attitudes
- Current behaviour
- Current circumstances
- Any other concerns
All the following fields in the 'Future Harmful Behaviour' section are required for sending ROSH Assets as XML. Please populate all fields below and try again:
- Are there indications that the young person will engage in future behaviour that will cause serious harm to others?
- Is immediate action required to prevent/reduce the risk of this behaviour occurring?
OK

In this situation, you will need to reassess that asset/document, fill in the fields indicated on the error message and close the document before sending the document again.

If the documents have been successfully e-mailed you will receive the following message:



Web-mail Server

If your YOS uses a web mail server site then you follow the above instructions but you e-mail the documents to yourself instead of the YJB Placements Unit and then you attach the relevant documents to an e-mail to be sent to the YJB Placements Unit. If you send them as Word documents you will probably have to compress the files.

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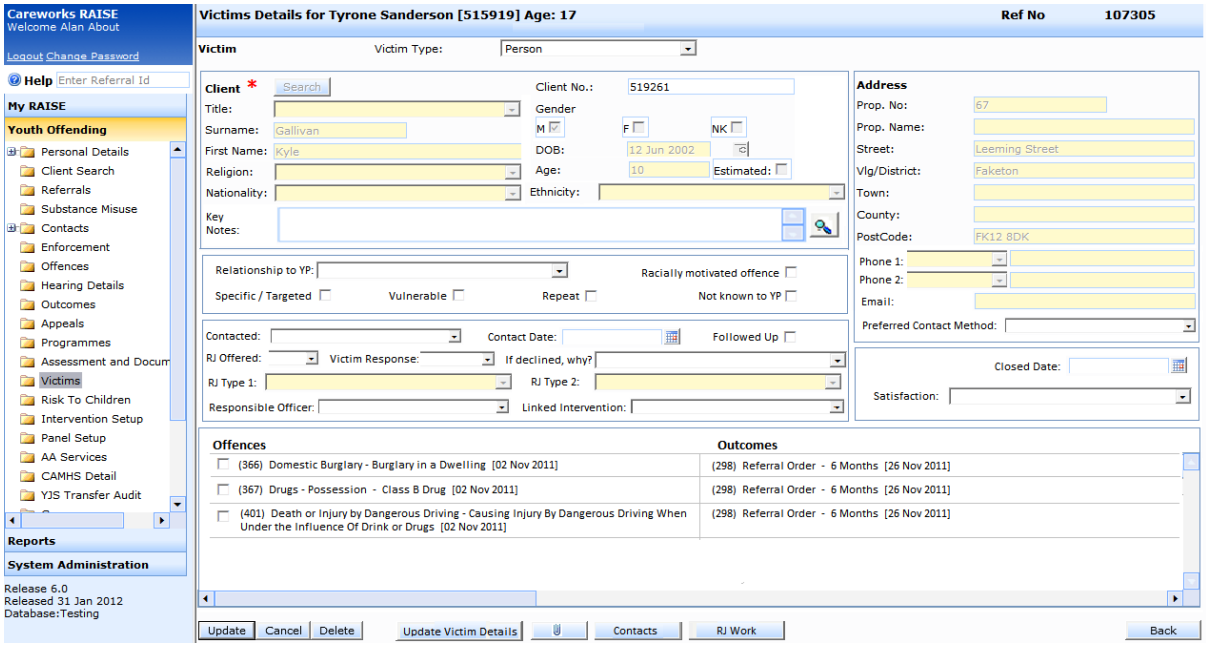
Chapter 11) Victims

The *Vvictims* module allows victim details to be recorded in relation to any referral and offence. Victim details are added to the person database and their client role should be set to “Victims” All victim records for a selected client or referral are displayed in the grid.

To access the Victims module, click on the *Victims* link on the left hand side of the screen.

The screen shown below will appear.



Field	*Description*
Contact Number	Auto populated from Victim record.
E-mail	Auto populated from Victim record.
Preferred Contact.	Select from drop-down list: Home Tel Mobile Work Tel Email Letter Visit

Victim Client Details

Field	*Description*
Contacted	Select from drop-down list: By Telephone By Email With Visit

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	By Letter By Other method No Unable Yes
RJ Offered	Select from drop-down list: Yes No
Victim response	Select from drop-down list: Yes Declined Unable No
If Declined, why?	Select from drop-down list: (Person): Fear of meeting YP Fear of being ID-Ed by YP or friends Fear of repercussion Still too difficult Don't want to revisit experience Unlikely to benefit victim Unlikely to benefit YP Too busy/insufficient time Too far away to attend Not very affected by offence Didn't feel the need to attend Didn't want to attend Has moved on (Organisation): Insufficient time No staff available Insurance concerns Already dealt with Other Commitments Don't want to be recognised in community Happens too frequently to attend Told to do so by management
Satisfaction	Select from drop-down list: Very Satisfied Satisfied Indifferent Dissatisfied Very Dissatisfied Unable to Determine Did not Comment Commented
Closed date	Select a date from a calendar.

Victim Consultation Details

Field	*Description*
Specific/Targeted	Select check box.

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Vulnerable	Select check box.
Repeat	Select check box.
Not known to YP	Select check box.
Racially Motivated Offence	Select check box.
Offences	Pre populated with Offences on referral and tickboxes.
Outcomes	Auto-populated with outcome linked to displayed offence.

Victim Type Details

Field	*Description*
Relationship to YP	Mother Father Brother Sister Fellow pupil Fellow home care res. Not Known Known in passing Through peer groups
Linked Intervention	Pre-populated drop downs from interventions
RJ types	Auto-populated from the two highest scoring RJs in RJ button screen.
Responsible Officer	List of resposnsible officers (see system administrator)
Key notes	Free text

Victim Offences Details

Updating a Victim Record

Once a Victim record is selected in the grid, it can be opened by double-clicking.

To update the Victim record,

1. Double click to open the Victim record. It launches in the *Personal Details* window.
2. Click **Update Victim Details**. The Victim Personal Details window opens and the record is enabled for editing.
3. Edit the fields in the Victim record.
4. Click **Update**.

The updated details are saved to the Victims's Client record.

Searching for a Victim Record

It is possible to search for any victim from the Victims screen.

7. To search for a victim, click **Search**.
8. The *Victim Search* dialog launches.

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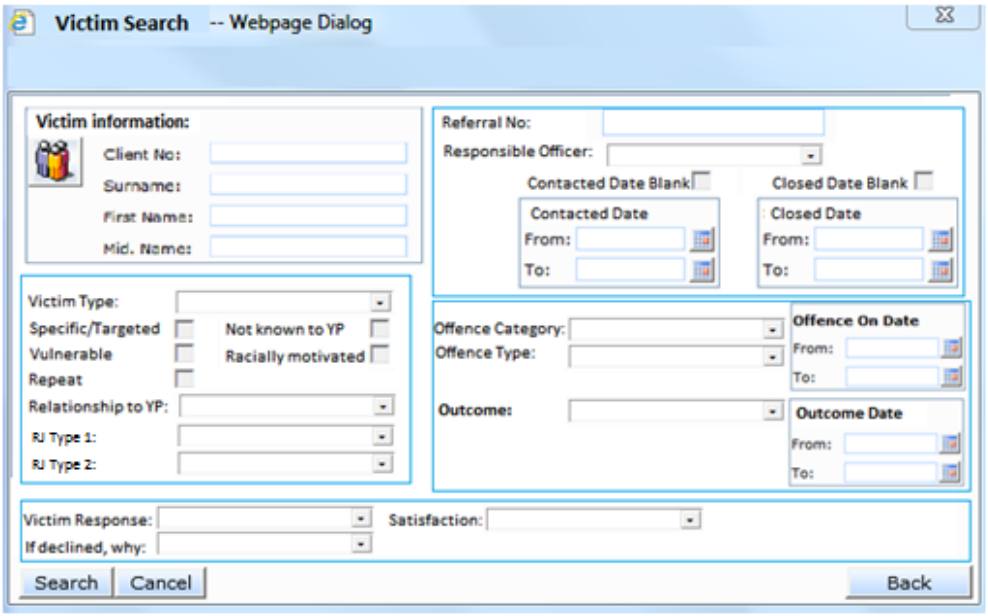


9. Enter any combination of data in the dialog, and click **Search**.
10. The records are returned. "There are xxxx records that match your query. Do you wish to view these records?'
11. To view the records, click '**OK**'.

Once you select a record which has been returned, the current client of referral is deselected and the victim records are displayed in the grid.

Attached Files

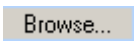
The *Attached files* button is located at the bottom of the Victims screen and it allows you to attach electronic files associated to the client. An attached document is viewed by double clicking on its name in the list of documents.

An attached files record includes:

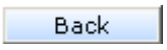
- A **Caption** describing the attachment,
- the **Document** location within the electronic filing system,
- and the **Date** it was attached,

which are recorded on the form in the appropriate fields.

- To add an electronic file – click **Insert.**
- To update an electronic file, click **Update**
- To delete an electronic file, click **Delete**
- To clone an electronic file, click **Clone.**

The 

button is used to navigate the computer filing system to select the required file, and the file path is then automatically recorded. A date is required on this form. The user is prompted to supply the date if it is not entered.

The 

button is used to return to the Referral screen.

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The **Document Type** and **Document Sub Type** are used to categorise documents for viewing in the Document View module. **Document Type** refers to the module the document is being attached to, while **Document Sub Type** describes the document being attached.

Victim Contacts

All contacts with the victim can be recorded using the *Contacts* button at the bottom of the Victim record.

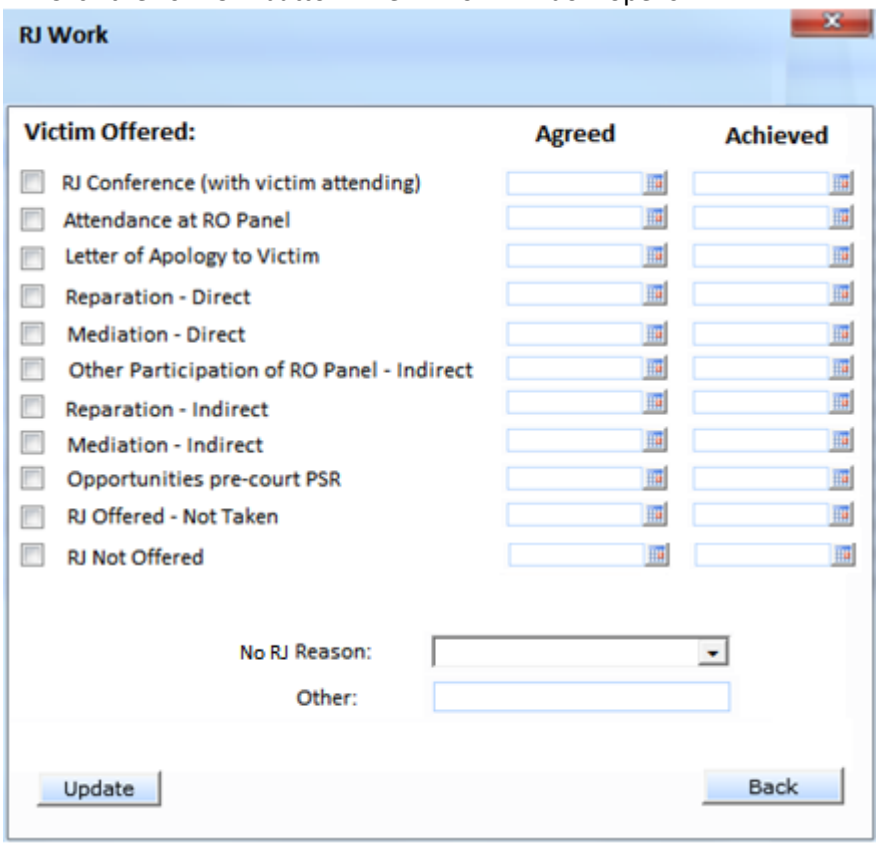
Clicking **Contacts** launches the *Contacts* window. Here, you can record a new contact, or view any previously recorded contacts.

Adding RJ work to a Victim Record

Any Restorative Justice (RJ) work you do with a victim can be recorded in the Victim record.

To record RJ work,

1. Double-click to open the Victim record.
2. Click the **RJ Work** button. The *RJ work* window opens.



3. Select or amend any check boxes for RJ work for the listed offences and outcomes as appropriate.
   3.1. Victim Offered: the type of RJ work offered to the victim.
   3.2. Agreed: The type of RJ work agreed with the victim.
   3.3. Achieved: How you can record the date the RJ work was acheieved.
   3.4. No RJ Reason: reasons the victim refused RJ work.

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3.5. Other: An alternative reason to the listed reasons.

4. Click **Update**. The changes are saved.
5. Click **Back** to return to the victims screen.

The RJ Type 1 and RJ Type 2 fields in the victim record are populated with the top two scoring RJ Types. The types of RJ work will be returned in searches of the victim record.

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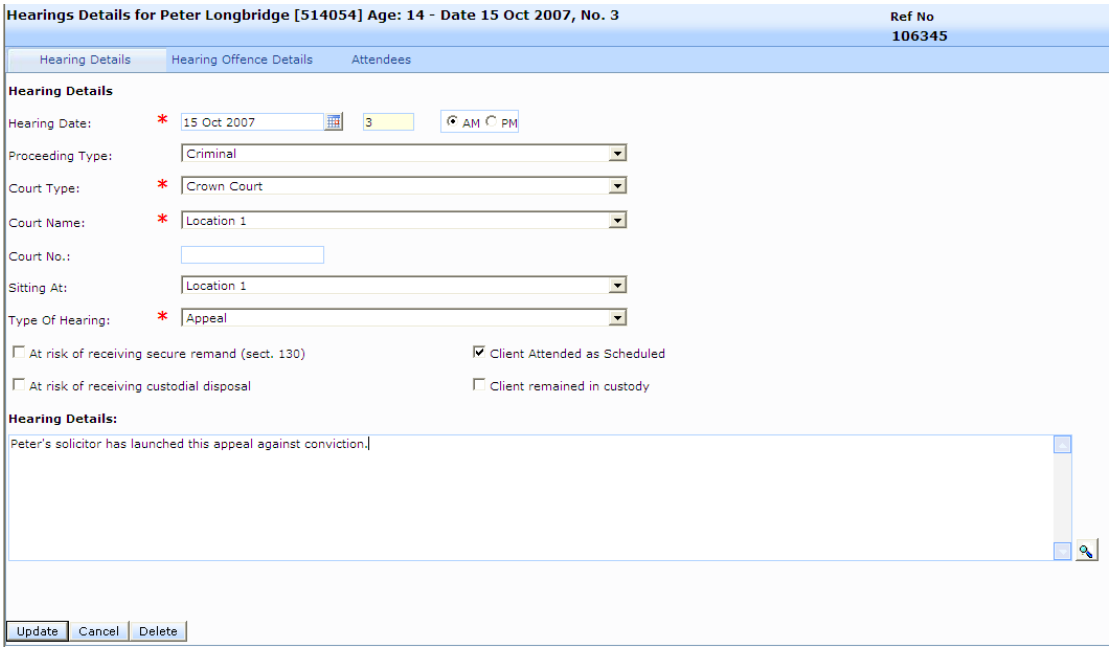
Chapter 12) Appeals

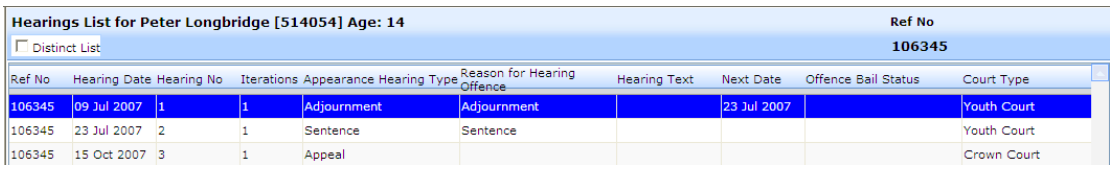
The Appeals module allows you to record Appeals against conviction or duration and their progress. In order for the appeal process to work the first action is to enter an Appeal Hearing within Hearing Details. Once this is entered the Appeal function has a link to the correct Hearings.

An Appeal Hearing is entered into Hearings. It will normally be the last in a sequence of hearings. In this example there had been two previous court hearings and the appeal was the third in the sequence:



When you are taken into Hearing Offence Details you can simply click on the back button as no offences need entering. The only time that you would use this screen is if the appeal is adjourned and if that is the case you would change the type of hearing from appeal to adjournment and obviously the next one would be the Appeal Hearing.

This will result in Hearing Type of Appeal being on grid:



Ref No	Hearing Date	Hearing No	Iterations	Appearance Hearing Type	Reason for Hearing Offence	Hearing Text	Next Date	Offence Bail Status	Court Type
106345	09 Jul 2007	1	1	Adjournment	Adjournment		23 Jul 2007		Youth Court
106345	23 Jul 2007	2	1	Sentence	Sentence				Youth Court
106345	15 Oct 2007	3	1	Appeal					Crown Court

At this point you click on the menu item Appeals:

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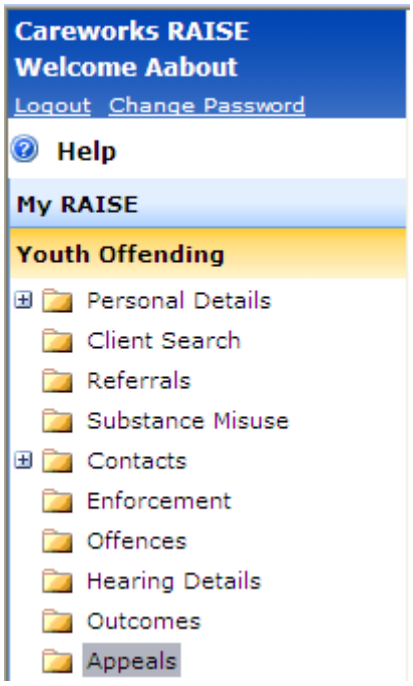
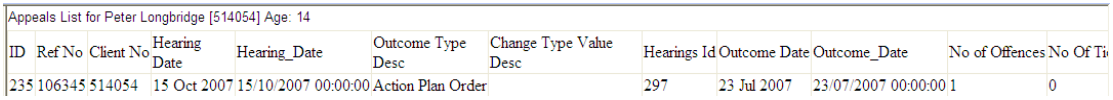


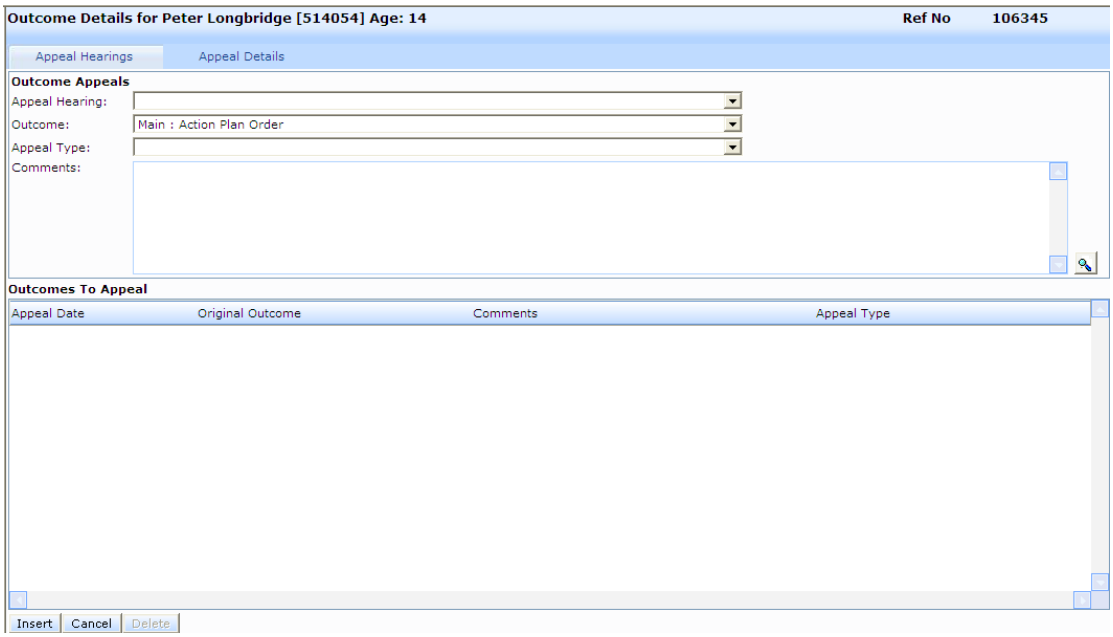
The entry you have made in hearings will be displayed as a gridline:



Appeals List for Peter Longbridge [514054] Age: 14

ID	Ref No	Client No	Hearing Date	Hearing_Date	Outcome Type Desc	Change Type Value Desc	Hearings Id	Outcome Date	Outcome_Date	No of Offences	No Of Ti
235	106345	514054	15 Oct 2007	15/10/2007 00:00:00	Action Plan Order		297	23 Jul 2007	23/07/2007 00:00:00	1	0

You then double click on the line in the grid which will show:



Fill in details. The appeal hearing entered will appear on the drop down for Appeal Hearing. The related outcomes will show within Outcomes and you choose the appropriate one. The appeal type will either be against conviction or against sentence so please ensure you choose the right one:

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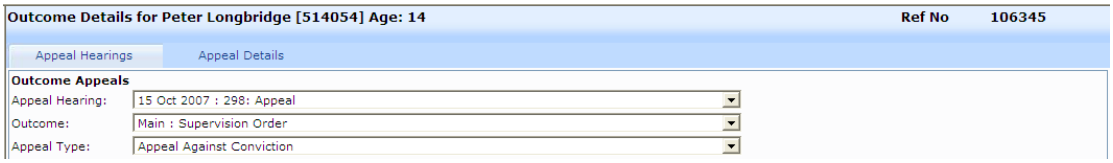
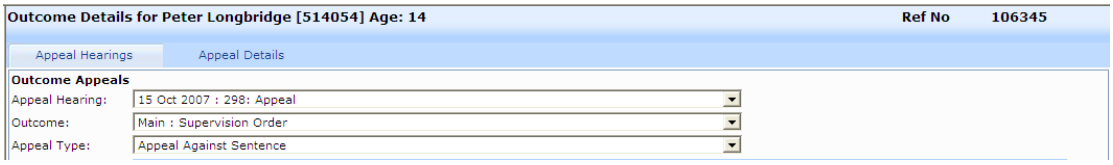
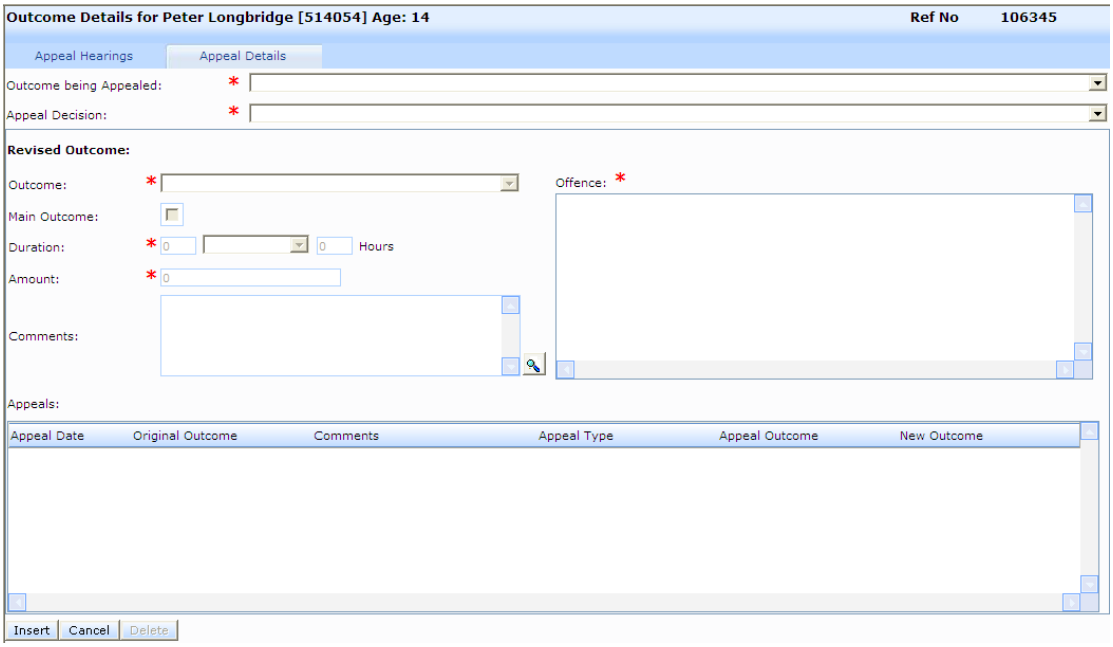

Outcome Details for Peter Longbridge [514054] Age: 14
Ref No 106345
Appeal Hearings
Appeal Details
Outcome Appeals
Appeal Hearing: 15 Oct 2007 : 298: Appeal
Outcome: Main : Supervision Order
Appeal Type: Appeal Against Conviction

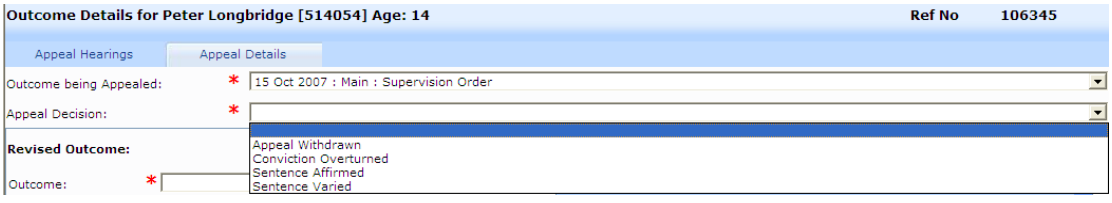
Or


Outcome Details for Peter Longbridge [514054] Age: 14
Ref No 106345
Appeal Hearings
Appeal Details
Outcome Appeals
Appeal Hearing: 15 Oct 2007 : 298: Appeal
Outcome: Main : Supervision Order
Appeal Type: Appeal Against Sentence

Once these are completed click on Insert. It will enter a grid entry on Appeal Hearings and take you to the Appeal Details:



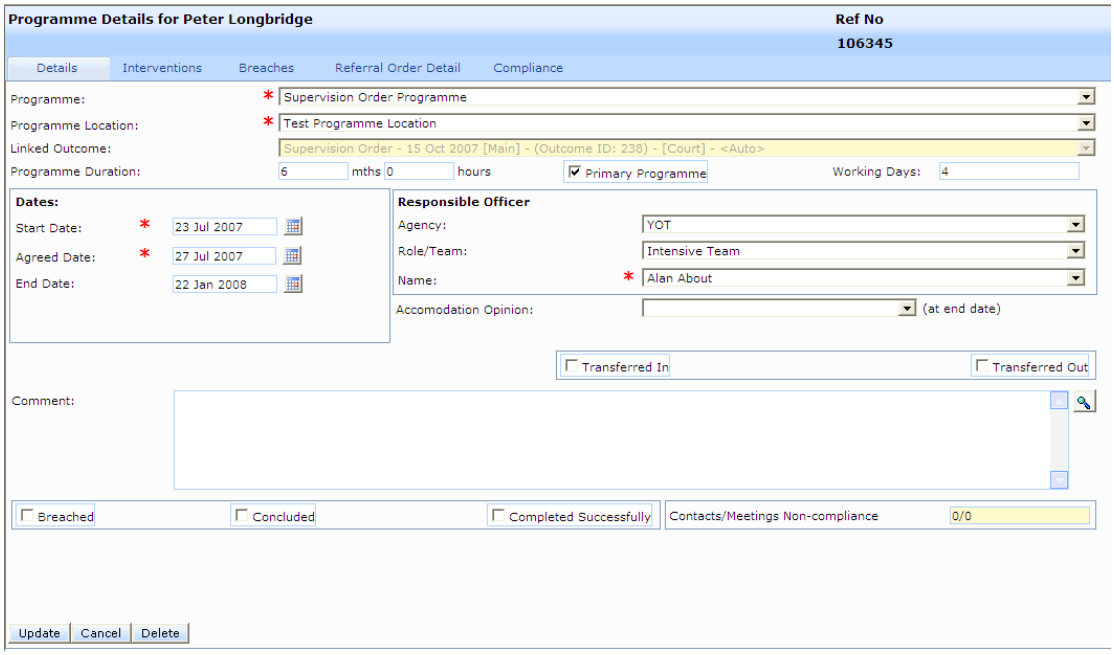
Click on the Appeal Details tab and complete. The Outcome being appealed will automatically populate. A decision needs to be made based on the outcome of the appeal:



If it is Appeal Withdrawn or Sentence Affirmed the process ends.

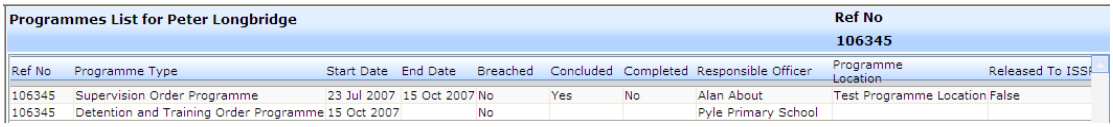
If it is Sentenced Varied then the sentence can be either increased or decreased in length or replaced with a completely new outcome. In our first example an order has been increased

from 6 to 12 months and consequently **CareDirector Youth** takes you to the programme screen to alter the end date of the programme.



In our second example the sentence given was a new order and in this case the 6 month Supervision Order was replaced with a 6 month Detention and Training Order. It will confirm that you have varied the sentence:

You will be taken to the Programmes where you will see the original programme and the new one:



You will need to conclude the original programme:

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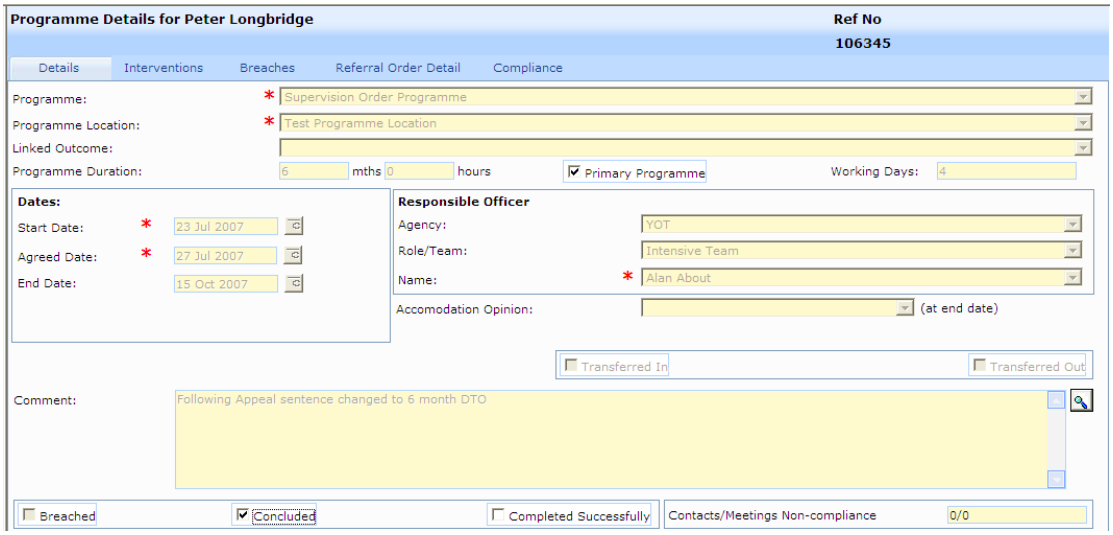
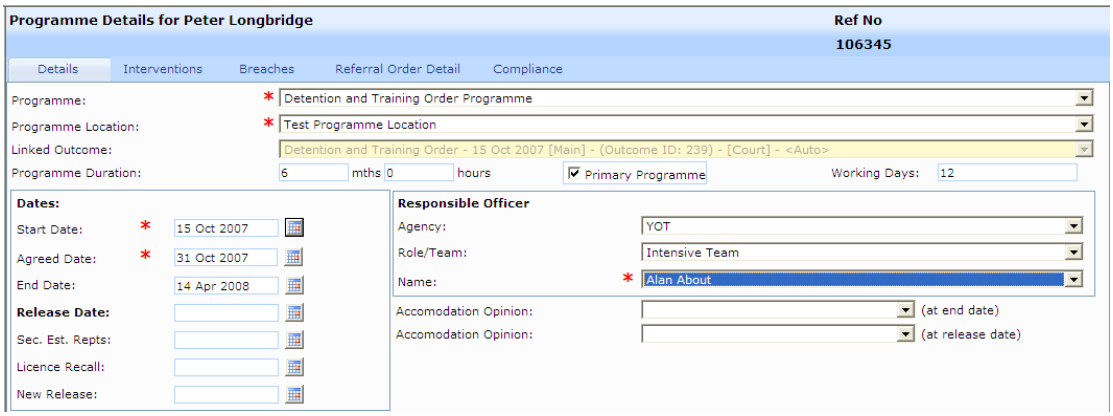
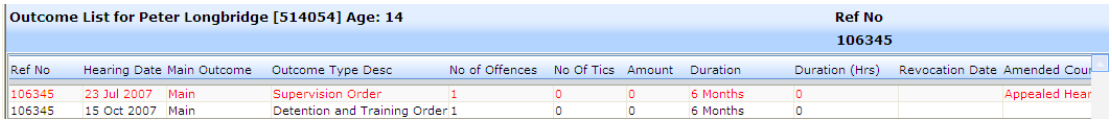


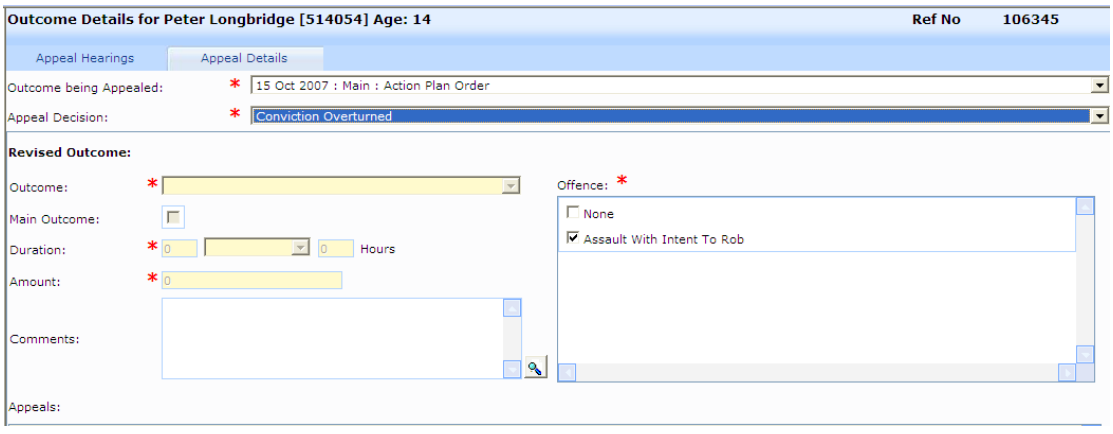
And update the new programme:



When you now view the Outcomes the original outcome has become a historical outcome and turned red whilst the new one remains active and in black:



If it is an appeal against Conviction and it is successful then the original outcome no longer stands in law:



However the outcome will still be displayed for historical purposes and will be in red.

Note: In the case of *Sentence Varied* or *Conviction Overturned* **CareDirector Youth** will hold a historical record of the original outcome but it will not count in any returns. The other two *Appeal Withdrawn* or *Sentence Affirmed* are self explanatory.

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Chapter 13) CAMHS

The Child and Adolescent Mental Health Services (CAMHS) module allows for the creation of a new CAMHS record or the amendment to an existing record for a young person. This function is carried out by the practitioner and by CAMHS staff. This module is used for the Youth Justice Board performance measures.

To access CAMHS you click on the appropriate icon on the left hand side of the screen:

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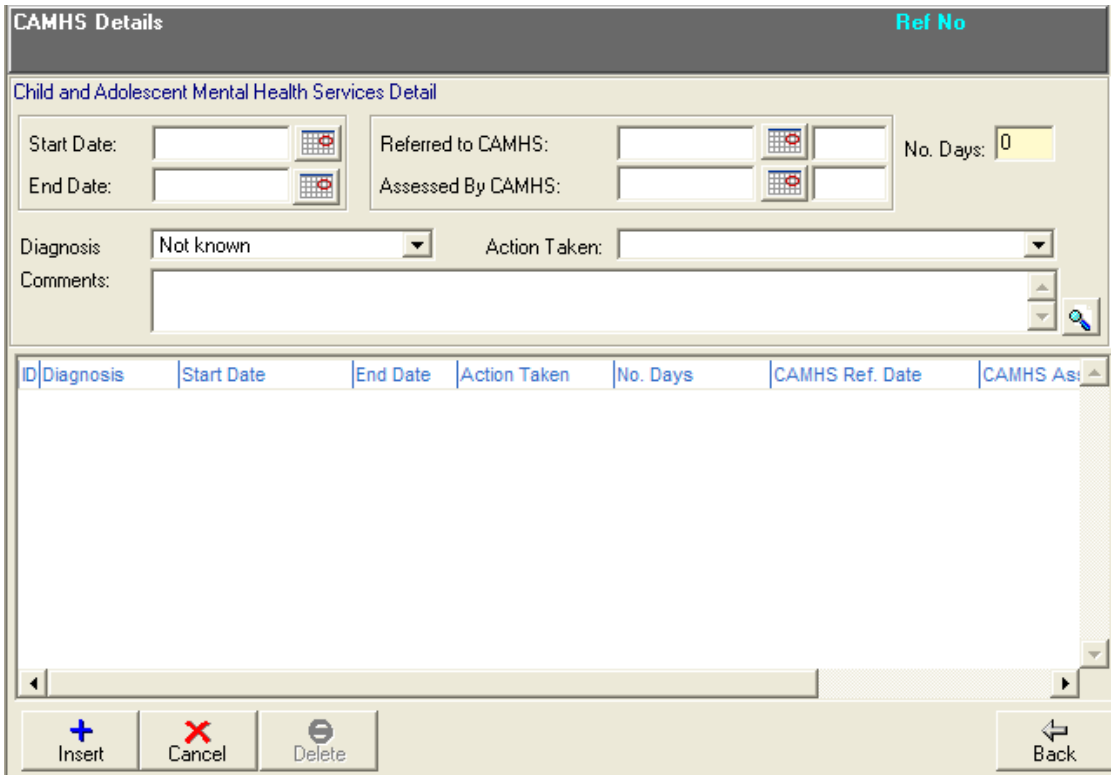
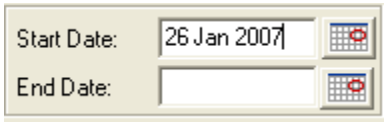
The following screen will appear:



You will fill in the Start Date as the date on which your concerns about the mental health of a young person commenced:



You would then fill in the date you referred to CAMHS:

Note: This may be to your specialist worker if they are seconded from CAMHS or via your health worker to CAMHS.

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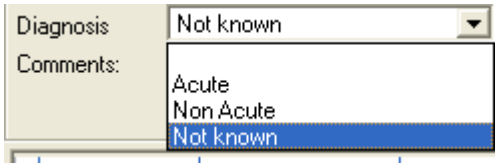
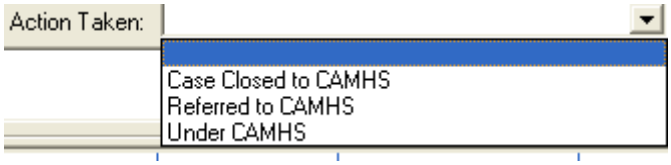
When the information is received from CAMHS either you or the specialist worker will fill in the date that the young person was assessed by CAMHS:

Note: The Working Days for Measures purposes is calculated automatically from the difference between the Referred to CAMHS Date/Time and the CAMHS Assessment Date/Time.

Following the assessment by CAMHS you should be able to enter whether the episode was seen as Acute or Non Acute:



Within Action Taken you can record the current status of the young person with CAMHS:



This can be updated as appropriate. Within Comments you may record relevant information.

At any point during this process you can click on

which will insert the record. However if no referral has been chosen you will get the following prompt:

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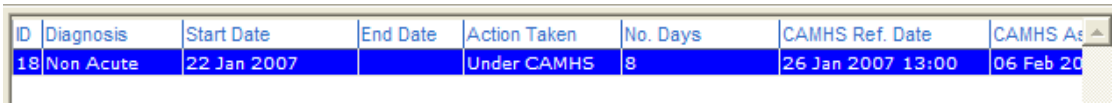
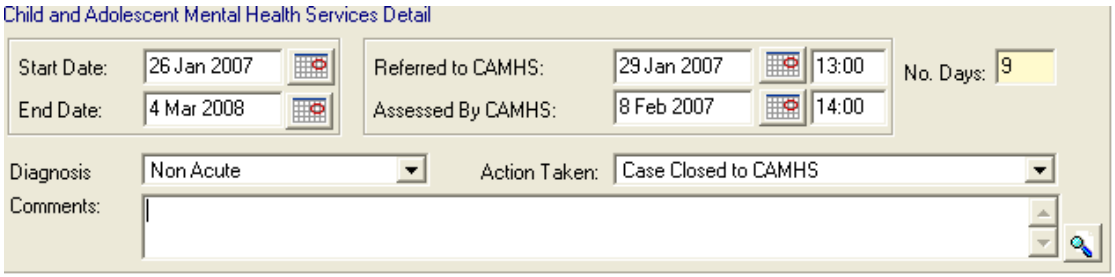
If the referral has been chosen then the record will be inserted into the bottom box after this confirmation message:



ID	Diagnosis	Start Date	End Date	Action Taken	No. Days	CAMHS Ref. Date	CAMHS As
18	Non Acute	22 Jan 2007		Under CAMHS	8	26 Jan 2007 13:00	06 Feb 20

At any stage if you click on the

button this will return the record to the top box for amendments. When you no longer believe that there is a mental health issue you can put in an End Date and alter the reason if necessary:



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Chapter 14) Appropriate Adult Services

This module allows the YOT to record the work they carry out as Appropriate Adults. Where a request is received at a YOT to provide an Appropriate Adult Service a new referral should be created, with the referral reason “Request for Appropriate Adult Service”. Whoever carries out the Appropriate Adult function can then record their work.

To use the module you click on AA Services in the menu:

You are presented with the following screen:

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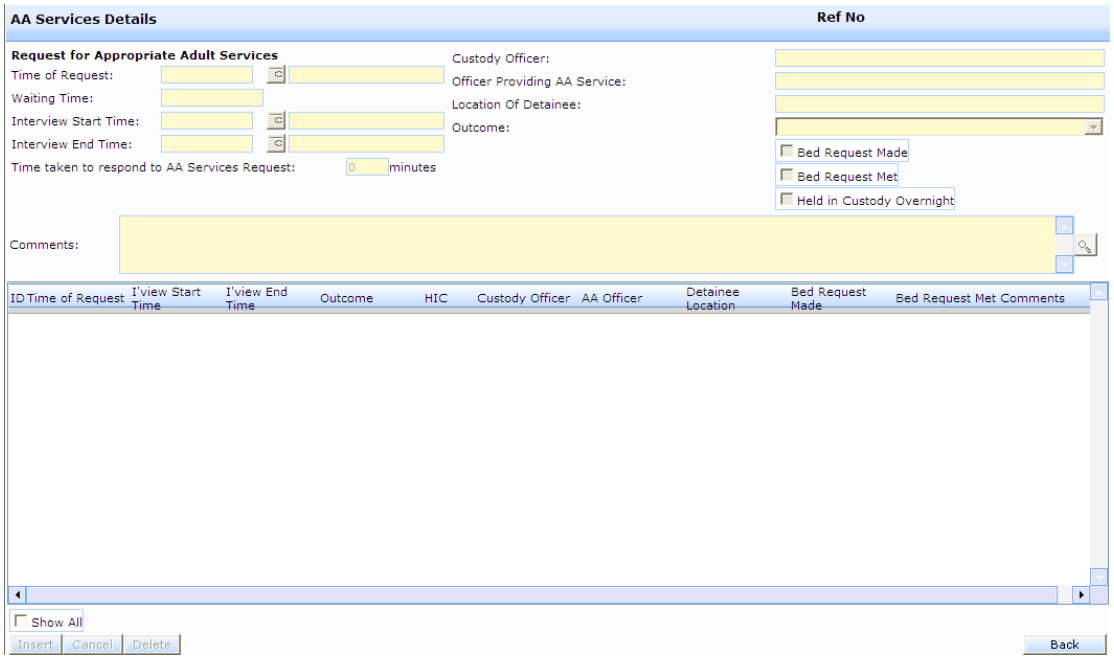
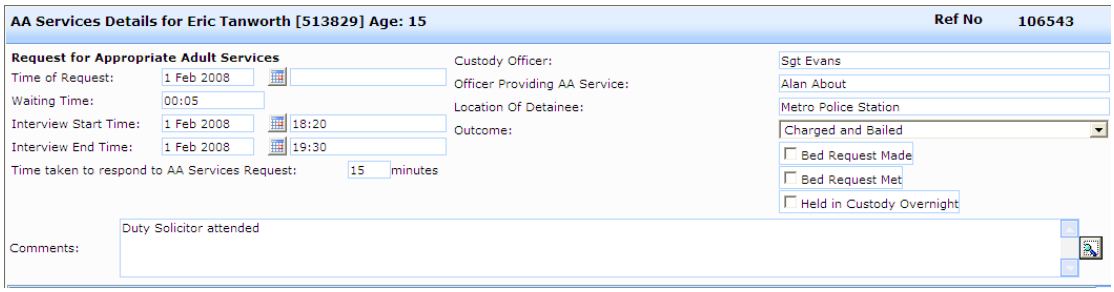
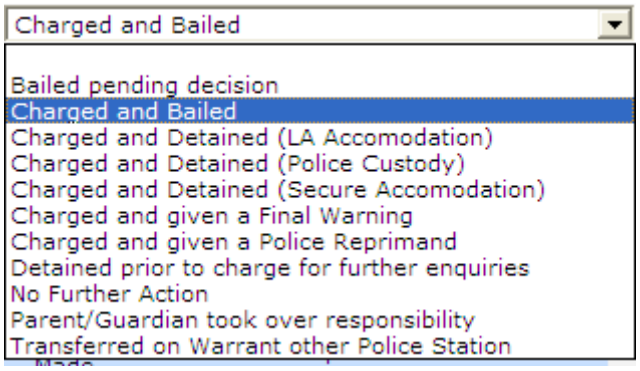


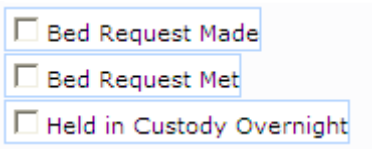
Complete the various fields:


AA Services Details for Eric Tanworth [513829] Age: 15
Ref No 106543
Request for Appropriate Adult Services
Time of Request: 1 Feb 2008
Waiting Time: 00:05
Interview Start Time: 1 Feb 2008 18:20
Interview End Time: 1 Feb 2008 19:30
Time taken to respond to AA Services Request: 15 minutes
Custody Officer: Sgt Evans
Officer Providing AA Service: Alan About
Location Of Detainee: Metro Police Station
Outcome: Charged and Bailed
Bed Request Made
Bed Request Met
Held in Custody Overnight
Comments: Duty Solicitor attended

The most important field is Outcome:


Charged and Bailed
Bailed pending decision
Charged and Bailed
Charged and Detained (LA Accomodation)
Charged and Detained (Police Custody)
Charged and Detained (Secure Accomodation)
Charged and given a Final Warning
Charged and given a Police Reprimand
Detained prior to charge for further enquiries
No Further Action
Parent/Guardian took over responsibility
Transferred on Warrant other Police Station

And whether a Request for a Bed was Made and/or Met and whether the young person was Held in Custody Overnight:



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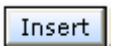
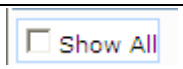
Each individual time a YOT member of staff attends for an Appropriate Adult session the details should be filled in.

Note: The Waiting Time relates to how long you are waiting at the Police Station before the interview commences.

Press 

to save this information to CareDirector Youth.

Note: The 

facility allows you to see all Appropriate Adult work and not just the sessions related to this referral.

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Chapter 15) Groups & Events/Incidents

This session describes the purpose of the Groups & Gangs modules and how to view and record Groups & Gangs and associated people and events, within CareDirector Youth.

- At the end of this session delegates will be familiar with
- The Purpose of the Groups & Gangs modules
- Recording, Updating and Deleting a Group or Gang, Characteristics, Members, associated Persons and Opponents of a Group or Gang and related Events and Incidents
- Managing the List screens for Groups & Gangs, Characteristics, Members, associated Persons and Opponents of a Group or Gang and related Events and Incidents
- Searching, Saving and Printing Groups & Gangs Characteristics, Members, associated Persons and Opponents of a Group or Gang and related Events and Incidents

The Groups and Events/Incidents modules have been developed based upon requirements of the YJB (Youth Justice Board) and feedback from Careworks Youth Offending Team customers.

The Groups and Events/Incidents modules are 'stand alone' modules within the system, which enable users to add a new Group (or Gang) and associate clients within CareDirector Youth with the Group (or Gang). Users are also able to add characteristics in relation to the Group (or Gang) and record Events and Incidents involving the Group (or Gang).

The user can trigger an automatic alert within Personal Details to inform others of a particular persons association with a Group (or Gang), and also an automatic email notification to a Team Manager to flag the same.

The stand-alone nature of the Groups and Events/Incidents modules enables easy configuration in terms of Profile Based Security, allowing the modules to be restricted at the levels required for prescribed staff. The stand-alone nature also means that users are able to enter all the necessary information in the one place, although linkage 'behind the scenes' between the Groups and other modules (such as Personal Details and Offences) will enable users to view relevant information from other areas and vice versa.

The Groups and Events/Incidents modules are located towards the bottom of the CareDirector Youth tree under the Youth Offending Team menu, to the left-hand side of the screen.

Both are stand alone modules. The opening screens displayed on selecting either of these modules, both work in the same way and are not client specific.

Even if the user has a particular client record open on screen when the Groups or Events/Incidents module is selected, the initial screen will display a list of all Groups or all Events/Incidents which exist, regardless of client.

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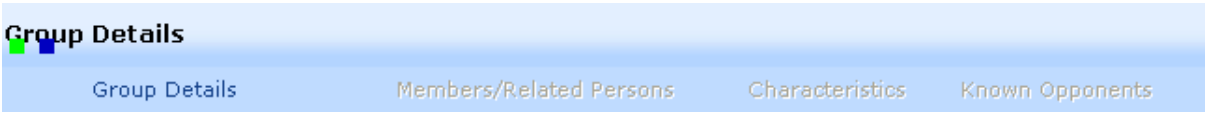
Groups Module

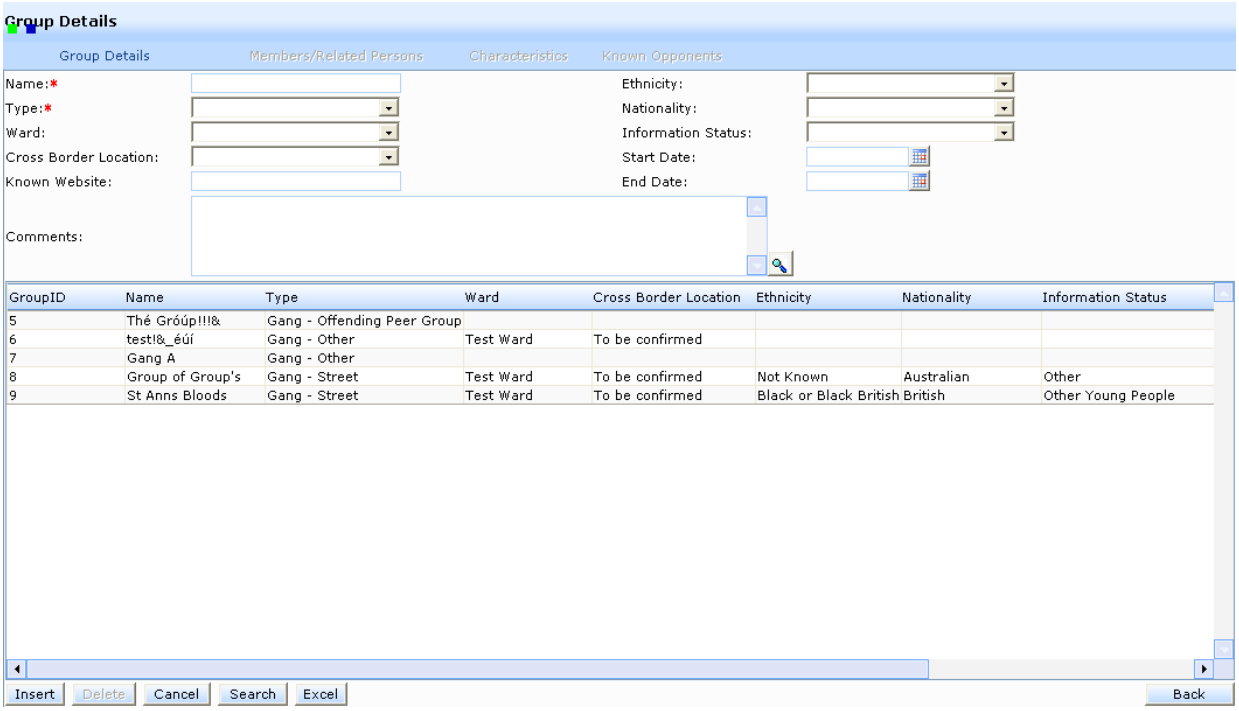
When the Groups module is selected on the CareDirector Youth tree, the Groups module will be displayed, with the Group Details tab open, and all Groups/Gangs in existence displayed in a list on screen.

The tabs for Members/Related Persons, Characteristics and Known Opponents will be disabled (and greyed out) until a Group has been created and/or selected from the list.



Group Details

The Group Details tab allows a user to view all existing Groups/Gangs in a list on screen, edit the details of an existing Group/Gang, and also create new Gangs/Groups.



To Create a New Group/Gang

To create a new Group, a name for the group must be entered into the free text mandatory field **Name**, and a group type must be selected from the mandatory drop down list **Type** as below:

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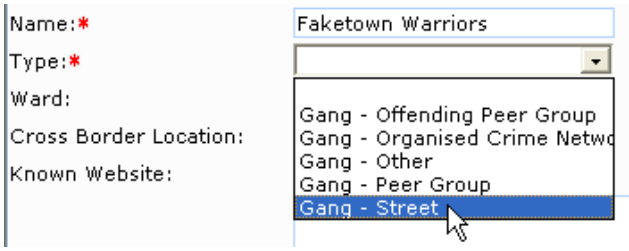


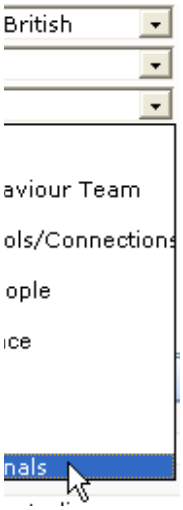
Ward refers to an area the Group is associated with, if relevant. This field displays the same list as in the Ward field in Personal Details.

The **Cross Border Location** field is also a drop down list field. The YJB intend this field to be used to record where the group originates from outside of the local authority borders. The options that display in this list are locally controlled, so this field can also be used to record varied detail about the Group location:

- Where the Group location originates from outside of the local authority borders
- Where the Group location is within local authority borders, but not Ward specific, for example, where the group area covers more than one ward
- Where the Group location is within local authority borders, but in a smaller area within a ward, for example, the name of a particular neighbourhood or estate

The **Known Website** field enables a user to free text type the address of a group website if there is a known one.

If there is a particular **Ethnicity** and/or **Nationality** associated with the Group, these can be chosen from the drop down lists, which show the same options as is Personal Details.



Information Status allows the user to record how the information about the group has come about.

The **Start Date** is the date the Group is created and/or known about.

Any relevant notes can be entered into the **Comments** field, and clicking the Insert button saves the information. A pop-up message confirms 'the record has been successfully inserted' and the new Group will appear in the list.

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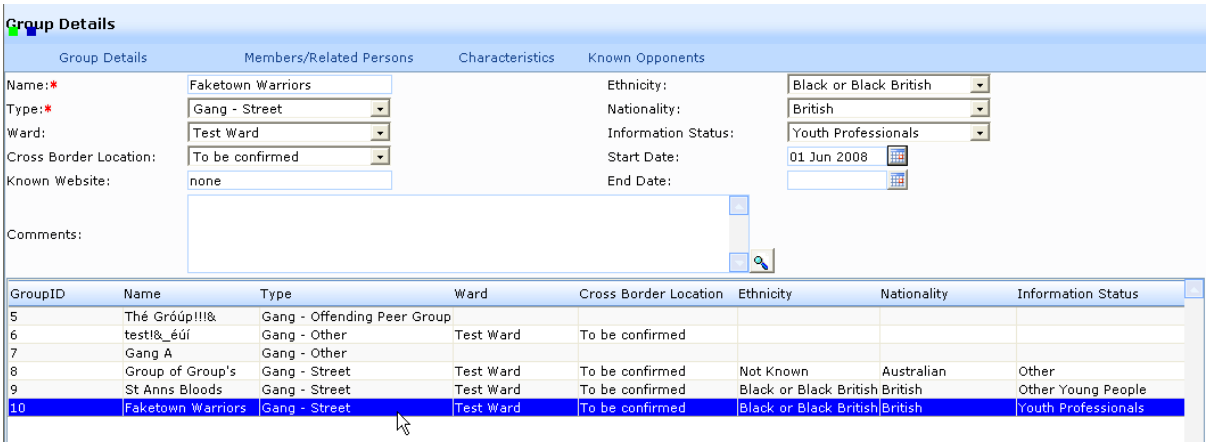
To Edit an Existing Group/Gang

To edit an existing Gang/Group, single click on the Group in the list to highlight it. The related details will be displayed in the top section of the screen, and the Insert button at the bottom left hand corner of the screen will change to an Update button.


Group Details
Group Details
Members/Related Persons
Characteristics
Known Opponents
Name:*
Faketown Warriors
Type:*
Gang - Street
Ward:
Test Ward
Cross Border Location:
To be confirmed
Known Website:
none
Comments:
Ethnicity:
Black or Black British
Nationality:
British
Information Status:
Youth Professionals
Start Date:
01 Jun 2008
End Date:
GroupID | Name | Type | Ward | Cross Border Location | Ethnicity | Nationality | Information Status
5 | Thé Gróúp!!!& | Gang - Offending Peer Group
6 | test!&_éúí | Gang - Other | Test Ward | To be confirmed
7 | Gang A | Gang - Other
8 | Group of Group's | Gang - Street | Test Ward | To be confirmed | Not Known | Australian | Other
9 | St Anns Bloods | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Other Young People
10 | Faketown Warriors | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Youth Professionals

The user can make changes to the information fields as required before clicking the Update button to save the changes.

Again, a pop up message stating 'the record has been successfully updated' will confirm this.

Group/Gang List Screen Buttons

When there is no Group/Gang selected in the list, the Delete button will be disabled (greyed out). This button will become enabled once a Group/Gang is selected in the list.

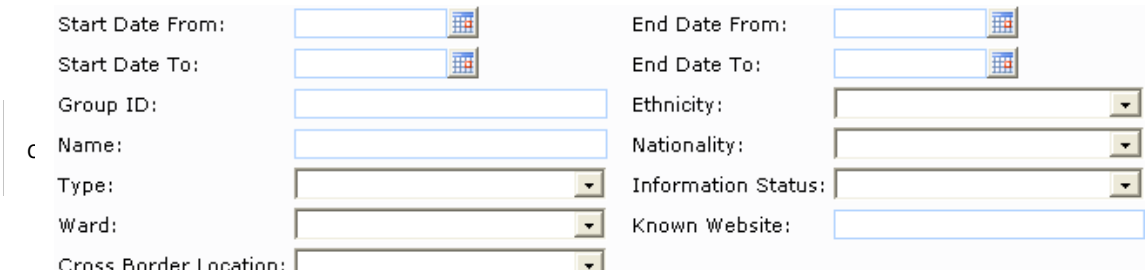
Clicking the Delete button will erase the Group/Gang that is currently selected and highlighted within the list.

> **Note**: If a Group/Gang if it is associated with a) an offence, and/or b) an Event/Incident when the delete button is clicked, then a pop up message will alert the user of the association and notify that the group cannot be deleted. If required, the user would need to delete the relevant association first, in order to allow deletion of the Group/Gang.

Clicking the [illegible] button will clear the screen by deselecting the current Group/Gang and removing the related information displayed in the fields, about the currently selected Group/Gang.

Searching Groups/Gangs

Clicking the Search button will open up a Groups Search window, as below:



Users can enter as much or as little search criteria as required into the relevant fields in this screen.

Clicking Back will return the user to the Group Details screen without conducting a search.

Clicking Cancel will clear any search criteria that has been entered, blanking out all the fields in the search screen.

Once the necessary search criteria has been entered, clicking the Search button in this screen will cause CareDirector Youth to search for any Groups/Gangs which match the given criteria, and a list of results will be displayed in the Group Details list screen.

> **Note**: The wildcard (*) key can be used in any of the search criteria fields, and multiple times within the same search if required, as in other search screens throughout CareDirector Youth.

Once the list of results has been returned into the list screen, clicking on Cancel in this screen will refresh the list, so that all Groups/Gangs are displayed once again, rather than just the search results.

Saving & Printing Groups/Gangs

The Excel button at the bottom of the list screen enables the user to export the currently displayed list into Excel, so that the list can be saved and/or printed.

Clicking on the Excel button will open up a selection window as below. In this window, users can select which columns from the list need to be exported.

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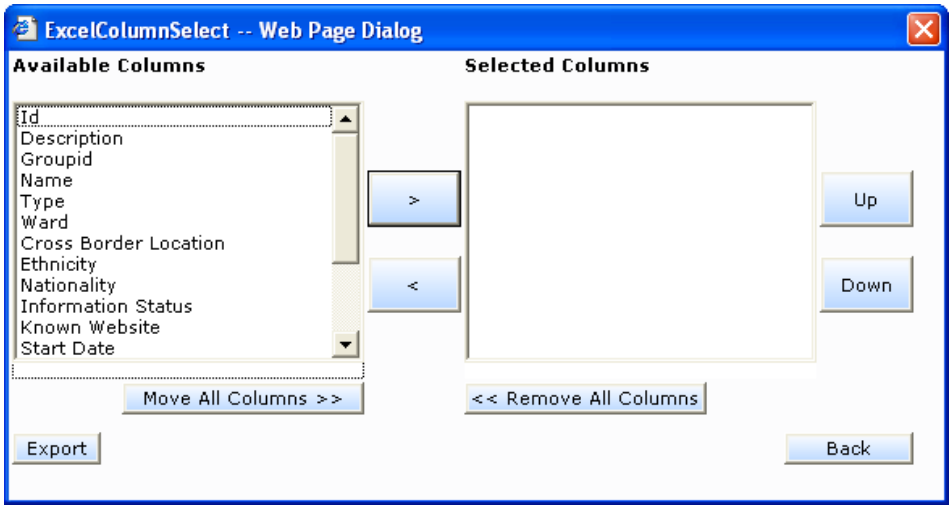


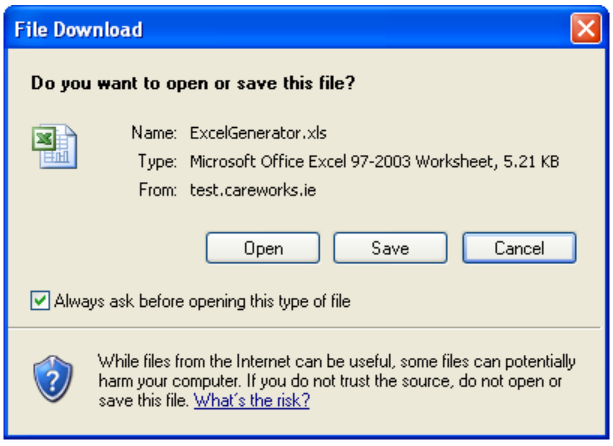
Users can click on an individual item in the 'Available Columns' list, to highlight, and click the > button to include it in the 'Selected Columns' list, repeating the process for each column required. Similarly, clicking the < button will move an item from the 'Selected Columns' list, back into the 'Available Columns' list.

Alternatively, clicking on Move All Columns >> or << Remove All Columns will shift the entire list from 'Available Columns' to 'Selected Columns' and vice versa.

If an item in the 'Selected Columns' list is selected (highlighted by single clicking), clicking on the Up and Down buttons will move the item up or down the list, altering the order of the columns as they will appear once they are exported into Excel.

Clicking on Back in this screen will return the user to the Groups/Gangs list screen without having exported anything.

Once the required items from the list have been moved into 'Selected Columns', and depending upon the local settings of Microsoft Excel, clicking the Export button will either open an excel spreadsheet containing the exported information, or open a window as below:


File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

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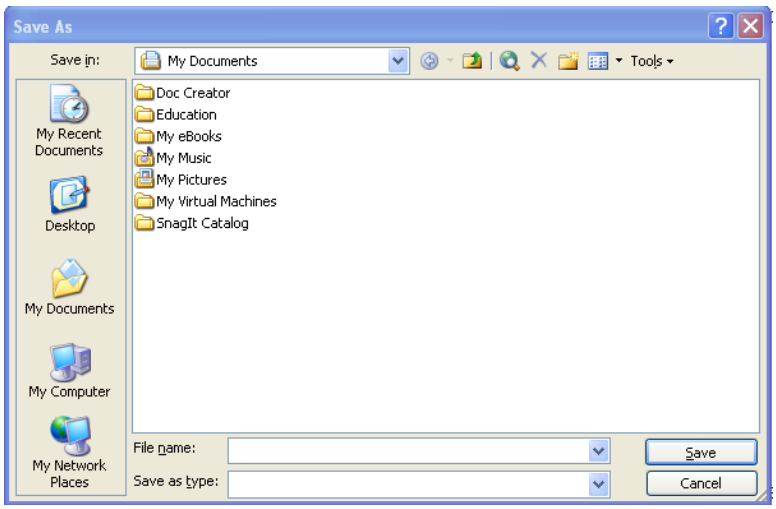
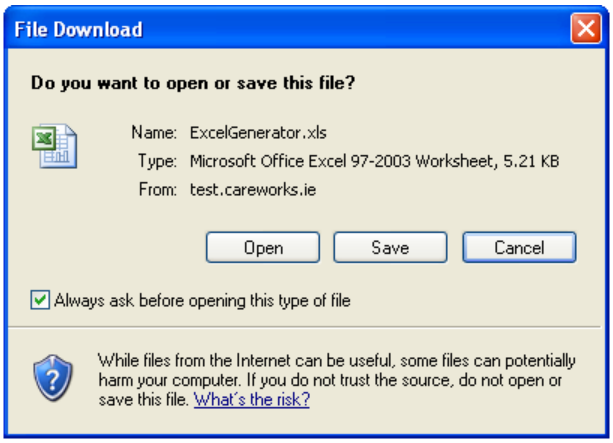
At this point, clicking Save opens a window as below, enabling users to name the file, navigate to a suitable location and click Save




File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Clicking Cancel or at this stage will return the user to the Groups/Gangs list screen without having exported anything.

Alternatively, clicking Open will display the exported information in an additional window on screen.

The Groups/Gangs list will be displayed within the excel spreadsheet as below. (From this screen, a user with Excel knowledge can manipulate the columns and exported information further).

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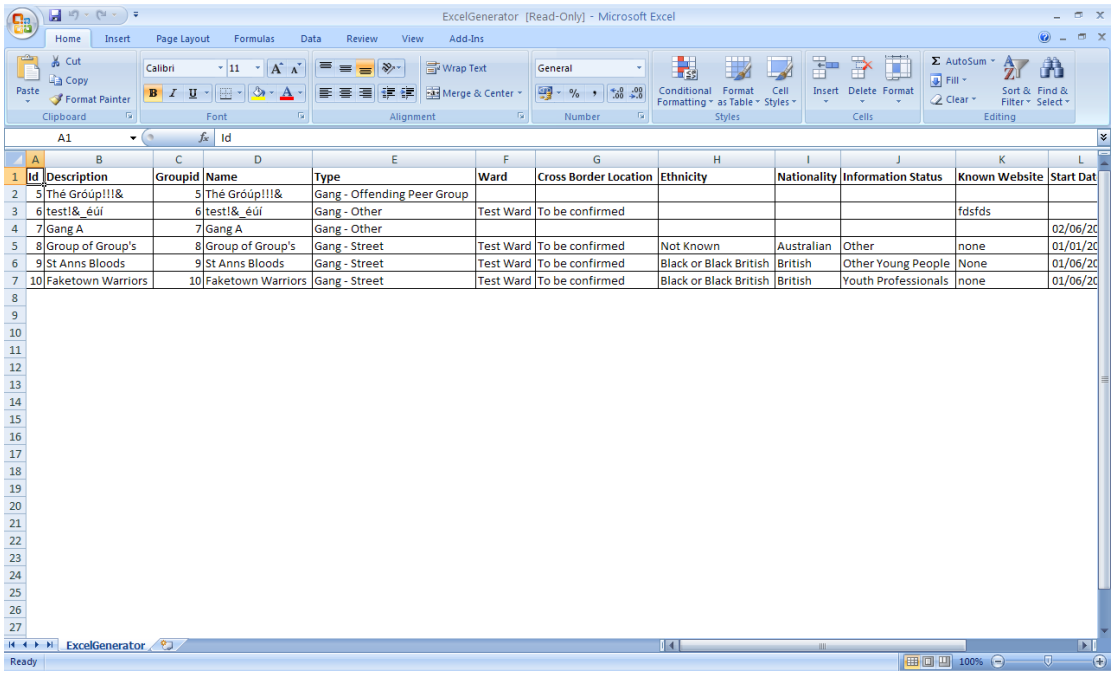
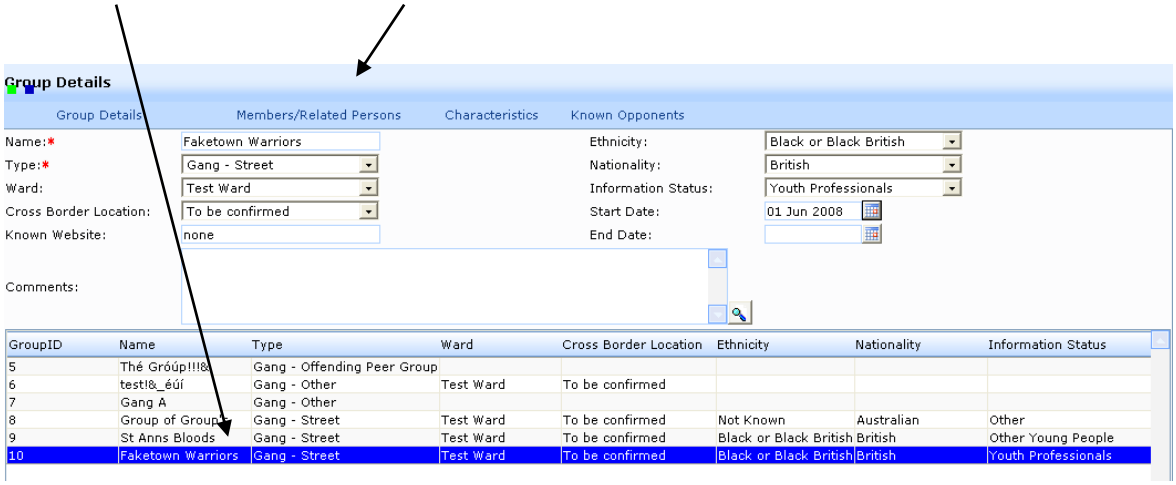

ExcelGenerator [Read-Only] - Microsoft Excel
Id
Id | Description | Groupid | Name | Type | Ward | Cross Border Location | Ethnicity | Nationality | Information Status | Known Website | Start Dat
5 | Thé Gróúp!!!& | 5 | Thé Gróúp!!!& | Gang - Offending Peer Group
6 | test!&_éúí | 6 | test!&_éúí | Gang - Other | Test Ward | To be confirmed | fdsfds
7 | Gang A | 7 | Gang A | Gang - Other | 02/06/20
8 | Group of Group's | 8 | Group of Group's | Gang - Street | Test Ward | To be confirmed | Not Known | Australian | Other | none | 01/01/20
9 | St Anns Bloods | 9 | St Anns Bloods | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Other Young People | None | 01/06/20
10 | Faketown Warriors | 10 | Faketown Warriors | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Youth Professionals | none | 01/06/20
ExcelGenerator
Ready

The information can be printed by clicking on the icon at the top of the screen, and the spreadsheet can also be saved from this screen, by clicking on File and Save As, before navigating to a suitable location and naming the file, as described above.

This screen is closed by clicking the in the top right hand corner.

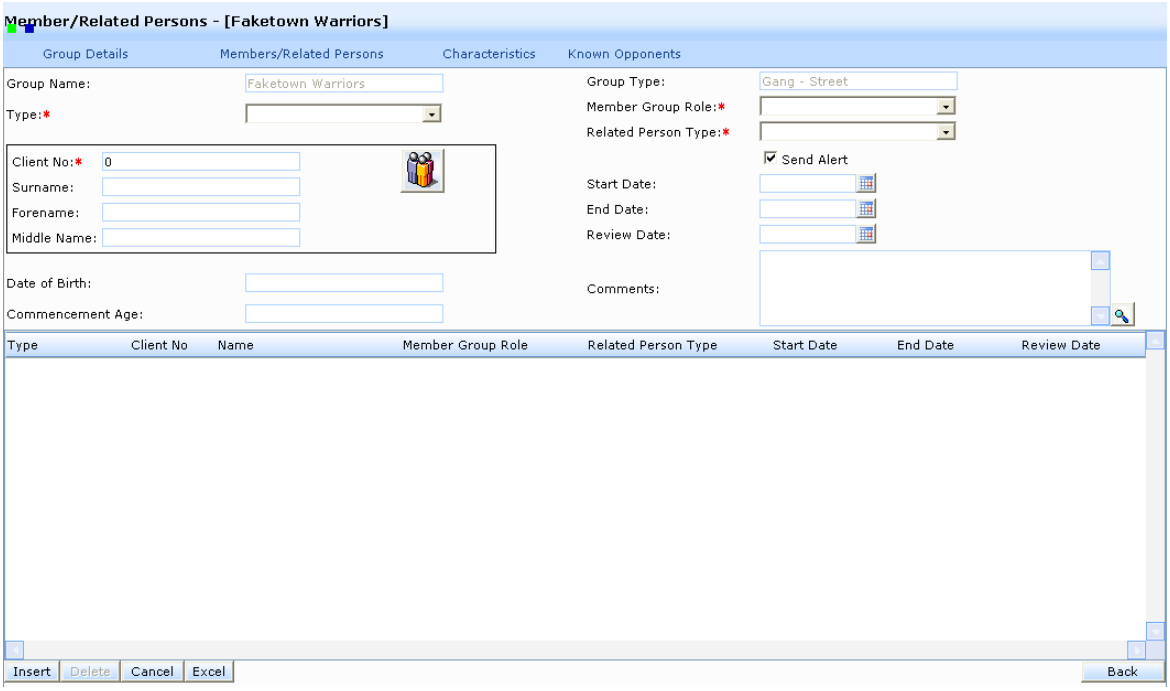
Members/Related Persons

Once a Group/Gang has been selected from the list on the Group Details list screen, the Members/Related Persons tab becomes enabled.


Group Details
Group Details
Members/Related Persons
Characteristics
Known Opponents
Name:* Faketown Warriors
Type:* Gang - Street
Ward: Test Ward
Cross Border Location: To be confirmed
Known Website: none
Ethnicity: Black or Black British
Nationality: British
Information Status: Youth Professionals
Start Date: 01 Jun 2008
End Date:
Comments:
GroupID | Name | Type | Ward | Cross Border Location | Ethnicity | Nationality | Information Status
5 | Thé Gróúp!!!& | Gang - Offending Peer Group
6 | test!&_éúí | Gang - Other | Test Ward | To be confirmed
7 | Gang A | Gang - Other
8 | Group of Group's | Gang - Street | Test Ward | To be confirmed | Not Known | Australian | Other
9 | St Anns Bloods | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Other Young People
10 | Faketown Warriors | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Youth Professionals

If there is no Group/Gang selected, the Members/Related Persons tab will be disabled (greyed out).

The Members/Related Persons tab allows a user to view all existing people who are known as associated with a particular group or gang in some way, edit details of an existing Member/Related Person, and also create new Members/Related Persons.



To Create a New Member/Related Person

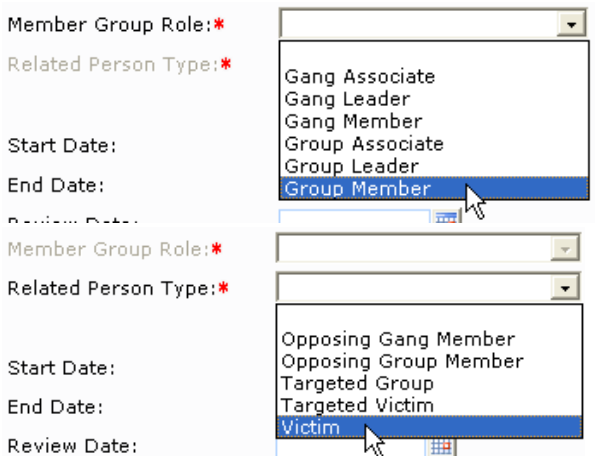
When the Members/Related Persons tab is opened, the selected Group/Gang will display in the banner, and it will also automatically appear in the fields, **Group Name** and **Group Type**, from information entered on the Group Details tab.

There are two **types** of people that can be associated with a Group/Gang - either a member, or a related person (associated with the Group in some way without being a member).

If 'Member' is selected from the **Type** drop down list, the Related Person Type drop down list will become disabled (greyed out) as below:

Similarly, if 'Related Person' is selected from the **Type** drop down list, the Member Group Role drop down list will become disabled:

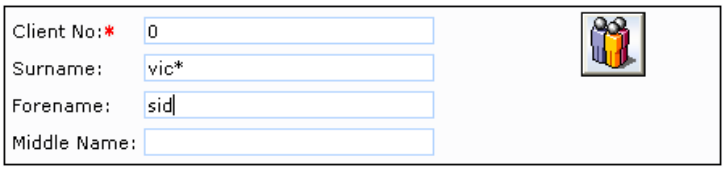
The user then selects from the **Member Group Role** or **Related Person Type** drop down list, as relevant. The available options in each list are outlined below:



The next step in the process is to search for the relevant person to associate with the Group/Gang, within CareDirector Youth.

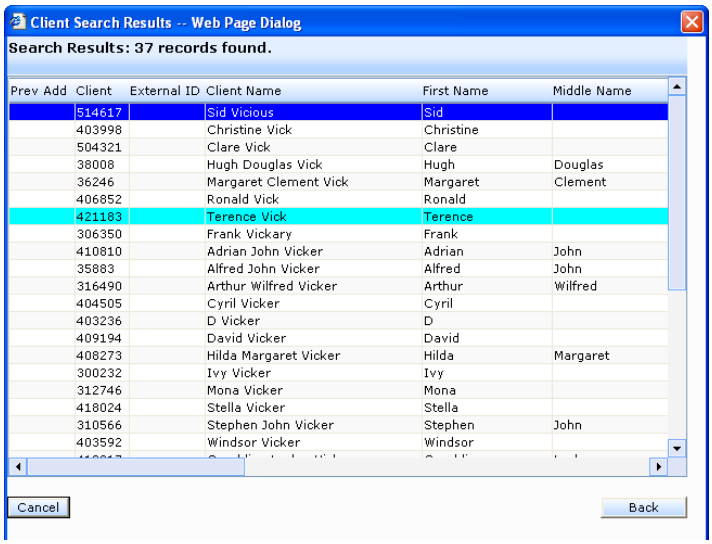
Note: In order to associate a person with a Group/Gang, they must first have a client record within CareDirector Youth.

To search for the person, enter some name information for search criteria (the wildcard (*) key can be used multiple times within the same search).



Once the search criteria are entered, click

CareDirector Youth will search to find any client records which match the search criteria, and will display a list of results as below.


Client Search Results -- Web Page Dialog
Search Results: 37 records found.
Prev Add
Client
External ID
Client Name
First Name
Middle Name
514617 Sid Vicious Sid
403998 Christine Vick Christine
504321 Clare Vick Clare
38008 Hugh Douglas Vick Hugh Douglas
36246 Margaret Clement Vick Margaret Clement
406852 Ronald Vick Ronald
421183 Terence Vick Terence
306350 Frank Vickary Frank
410810 Adrian John Vicker Adrian John
35883 Alfred John Vicker Alfred John
316490 Arthur Wilfred Vicker Arthur Wilfred
404505 Cyril Vicker Cyril
403236 D Vicker D
409194 David Vicker David
408273 Hilda Margaret Vicker Hilda Margaret
300232 Ivy Vicker Ivy
312746 Mona Vicker Mona
418024 Stella Vicker Stella
310566 Stephen John Vicker Stephen John
403592 Windsor Vicker Windsor
Cancel
Back

Clicking Cancel or Back from this screen will return the user to the Members/Related Person screen without selecting a person from the list of results.

Alternatively, double click on the relevant person in the results list.

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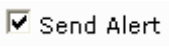
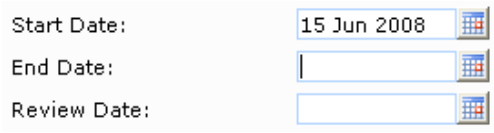
Information from their Personal Details will automatically display (their full name, client ID number and **Date of Birth**).

The **Commencement Age** is automatically calculated from the persons Date of Birth, to the Start Date that they are known to have begun association with the Group/Gang. This calculation takes place when the record is inserted.

The 

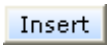
tick box automatically defaults to ticked, although a user can manually over-ride this and un-tick it by single clicking if required. (See later section on 'Alerts' for more detail).

Start Date refers to date when it is known that the person became associated with the Group/Gang.

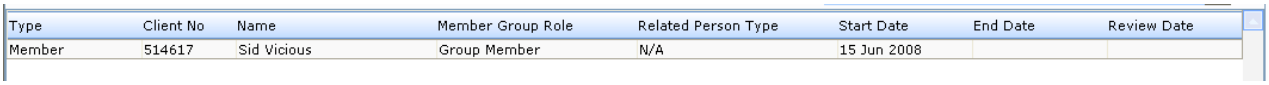


End Date refers to the date if/when it becomes known that the person has ceased to be associated with the Group/Gang. This can be added at a later date if required.

Users can enter a **Review Date** at regular intervals as and when the persons association is confirmed as ongoing, to display how recent the information is.

Any relevant notes can be entered into the **Comments** field, and clicking the 

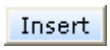
button saves the information. A pop-up message confirms 'the record has been successfully inserted' and the new Member/Related Person will appear in the list as below.



Type	Client No	Name	Member Group Role	Related Person Type	Start Date	End Date	Review Date
Member	514617	Sid Vicious	Group Member	N/A	15 Jun 2008		

When a person is inserted within the members screen, they will automatically become the currently selected client record for the logged in user.

To Edit an Existing Member/Related Person

To edit an existing Member/Related Person, single click on the person in the list to highlight them. Their related details will be displayed in the top section of the screen, and the 

button at the bottom left hand corner of the screen will change to an

button.

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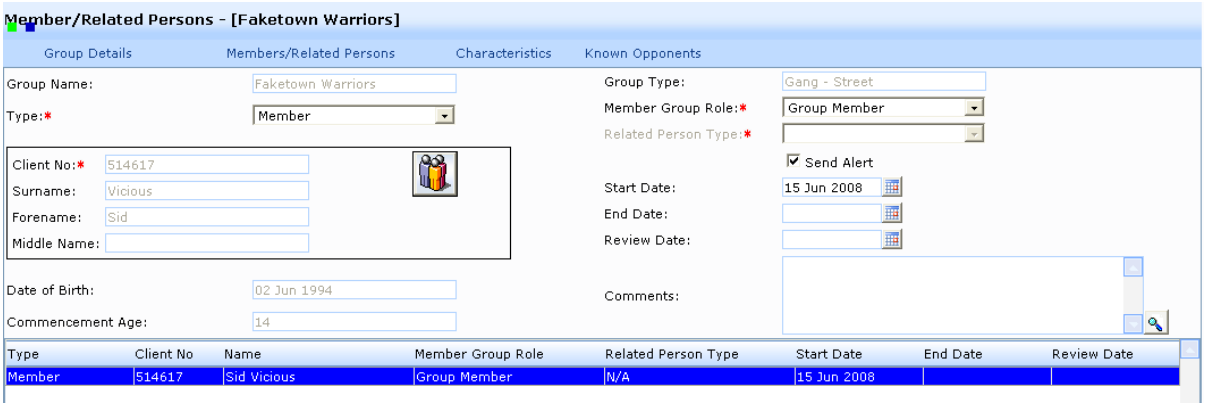


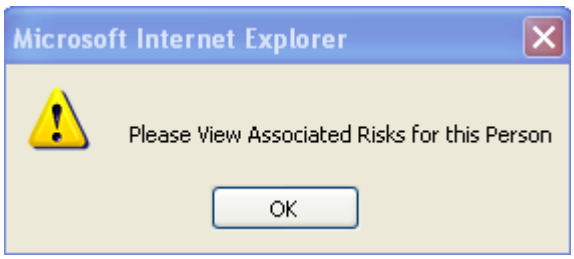
The user can make changes to the information fields as required before clicking the Update button to save the changes.

Again, a pop up message stating 'the record has been successfully updated' will confirm this.

Group/Gang Association Alerts

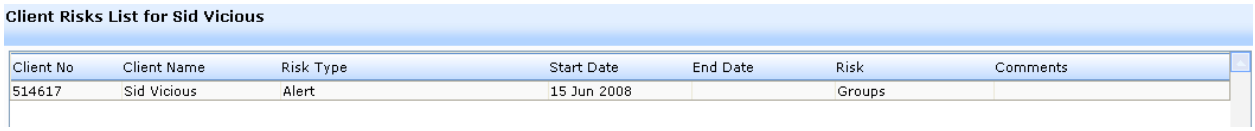
The Send Alert tick box on the Member/Related Person tab defaults to 'ticked'. This can be manually over-ridden and un-ticked by single clicking if required.

When a Member/Related Person is inserted and the Send Alert tick box is ticked, an automatic alert is created within the Personal Details module and more specifically, the 'Client Risks' sub-module, within that persons client record.

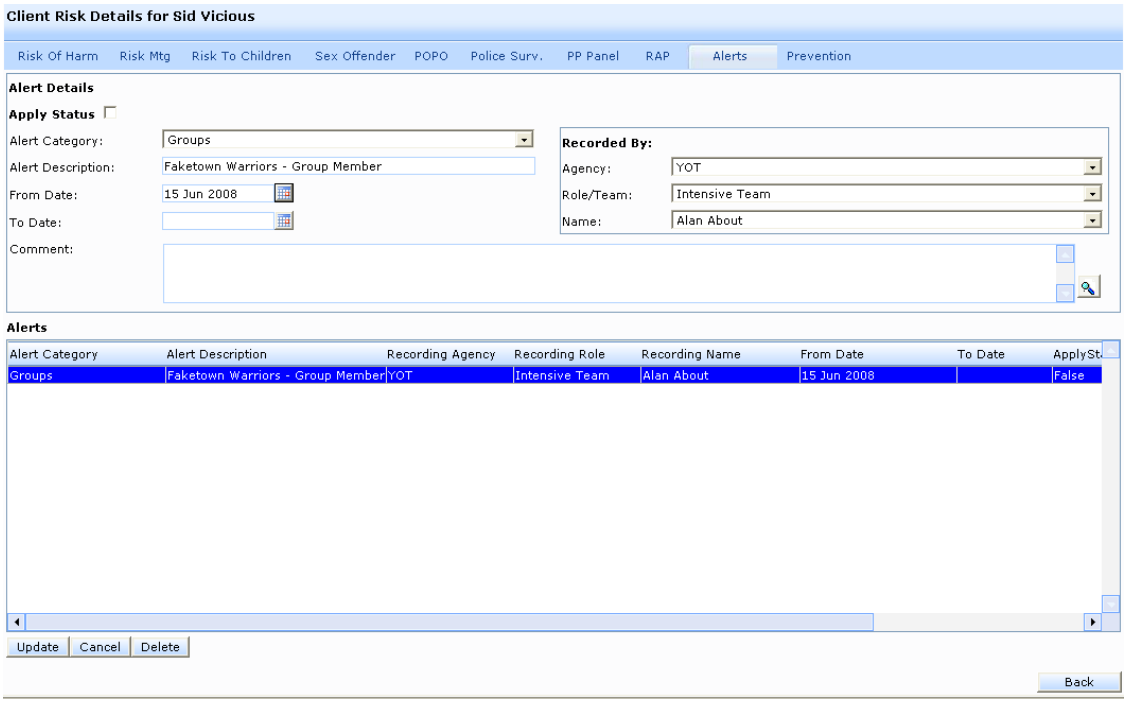


As such, when the Member/Related Person's client record is opened by a user, the following message shown to the left will pop up on screen.

Once the user has clicked OK to this message, on selecting the **Client Risks** sub module under Personal Details, the user will be able to view the alert that was automatically created when the person's association with the Group/Gang was inserted in the Groups module.



Double clicking on the Groups Alert in the list will open up the **Alerts tab** within Client Risks for the user to view. From this screen, single clicking on the Groups Alert to highlight it in the list, will display the relevant detail in the top section of the screen as below:



The system will also automatically generate a 'silent' email to the Team Leader of the Primary allocated worker of the Member/Related Person, to notify them that a Groups Alert has been added to the Client Risks.

Member/Related Persons List Screen Buttons

When there is no Member/Related Person selected in the list, the Delete button will be disabled (greyed out). This button will become enabled once a Member/Related Person is selected in the list.

Clicking the Delete button will erase the Member/Related Person that is currently selected and highlighted within the list.

Note: Clicking Delete will only erase the Person's association with the Group/Gang – it will **not** erase their client record from Personal Details.

Clicking the Cancel button will clear the screen by deselecting the current Member/Related Person and removing the related information displayed in the fields, about the currently selected Member/Related Person.

Saving & Printing Members/Related Persons

The Excel button at the bottom of the list screen enables the user to export the list currently displayed, into Excel, so that the list can be saved and/or printed.

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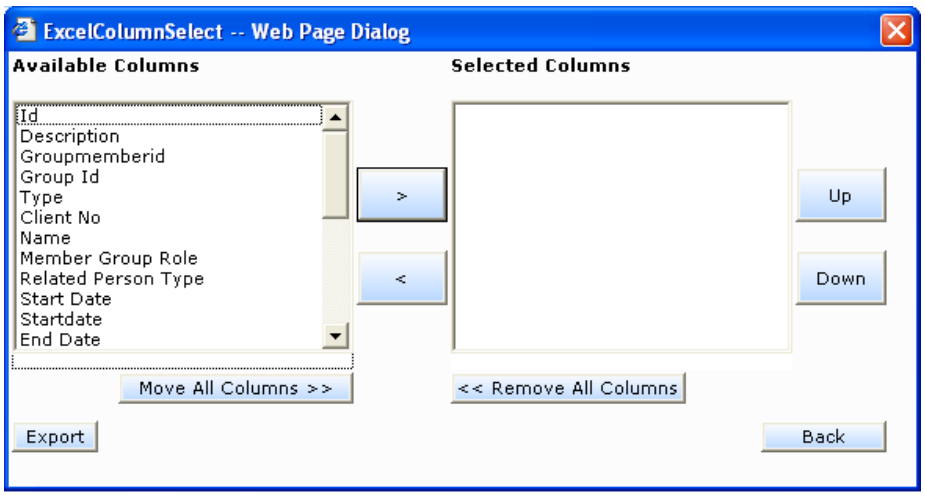
Clicking on the Excel button will open up a selection window as below. In this window, users can select which columns from the list need to be exported.



Users can click on an individual item in the 'Available Columns' list, to highlight, and click the > button to include it in the 'Selected Columns' list, repeating the process for each column required. Similarly, clicking the < button will move an item from the 'Selected Columns' list, back into the 'Available Columns' list.

Alternatively, clicking on Move All Columns >> or << Remove All Columns will shift the entire list from 'Available Columns' to 'Selected Columns' and vice versa.

If an item in the 'Selected Columns' list is selected (highlighted by single clicking), clicking on the Up and Down buttons will move the item up or down the list, altering the order of the columns as they will appear once they are exported into Excel.

Clicking on Back in this screen will return the user to the Members/Related Persons list screen without having exported anything.

Once the required items from the list have been moved into 'Selected Columns', and depending upon the local settings of Microsoft Excel, clicking the Export button will either open an excel spreadsheet containing the exported information, or open a window as below:

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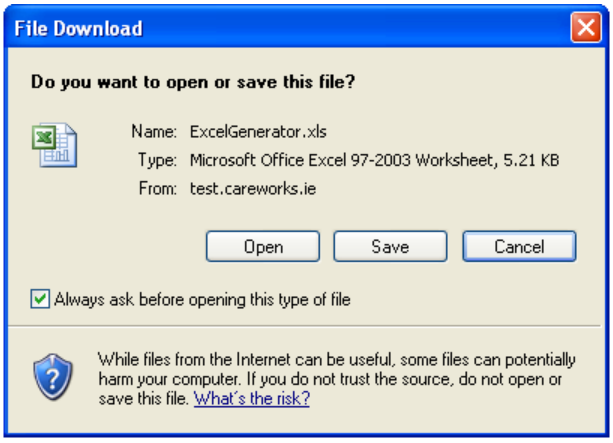
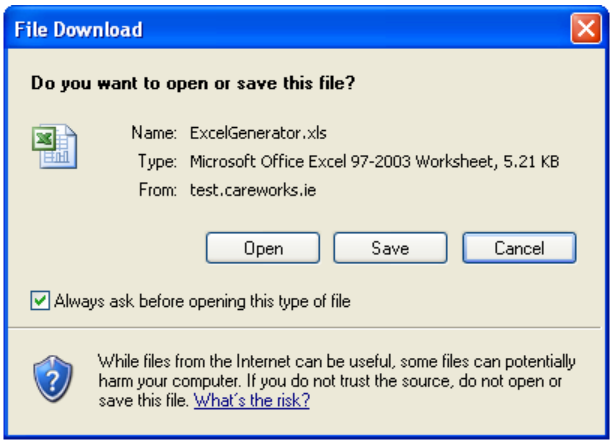

File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

At this point, clicking Save opens a window as below, enabling users to name the file, navigate to a suitable location and click Save


File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Clicking Cancel or Open at this stage will return the user to the Members/Related Persons list screen without having exported anything.

Alternatively, clicking Open will display the exported information in an additional window on screen.

The Members/Related Persons list will be displayed within the Excel spreadsheet as below.

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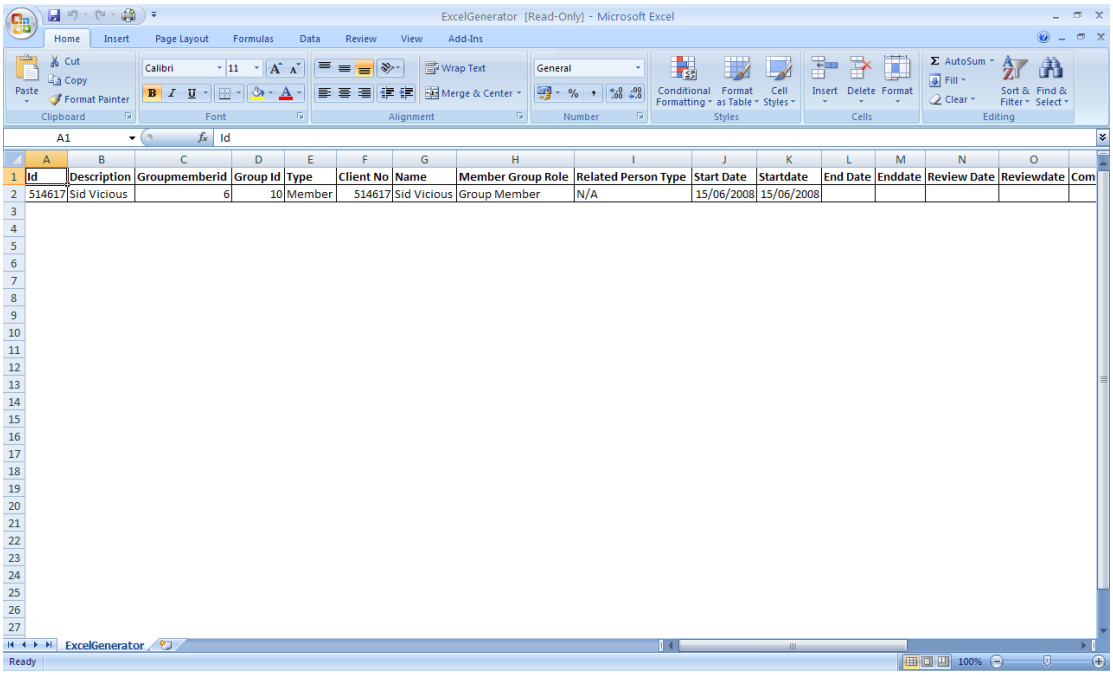


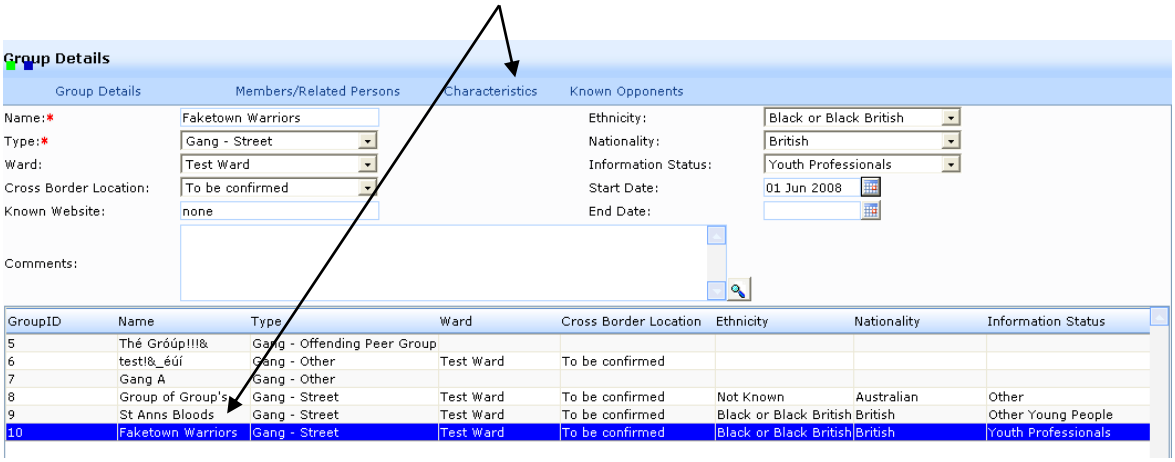
From this screen, a user with Excel knowledge can manipulate the columns and exported information further.

The information can be printed by clicking on the icon at the top of the screen, and the spreadsheet can also be saved from this screen, by clicking on File and Save As, before navigating to a suitable location and naming the file, as described above.

This screen is closed by clicking the in the top right hand corner.

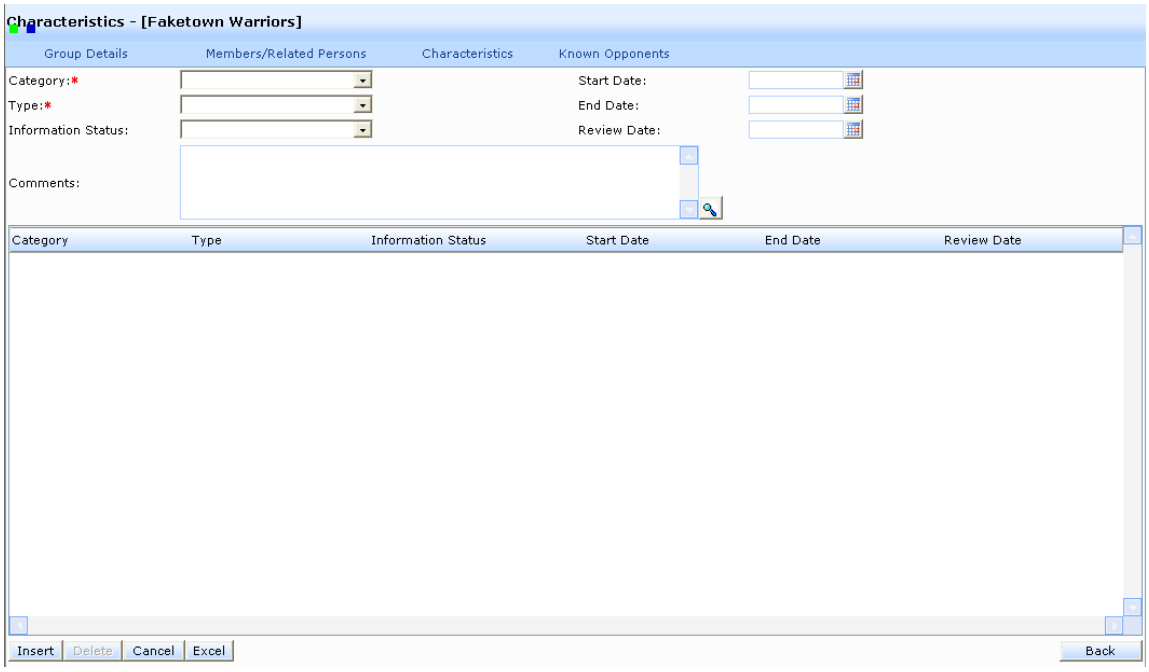
Characteristics

Once a Group/Gang has been selected from the list on the Group Details list screen, the Characteristics tab becomes enabled.



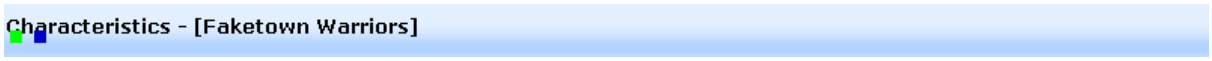
If there is no Group/Gang selected, the Characteristics tab will be disabled (greyed out).

The Characteristics tab allows a user to view all existing characteristics or traits associated with a particular group or gang in some way, edit details of an existing Characteristic, and also create new ones.

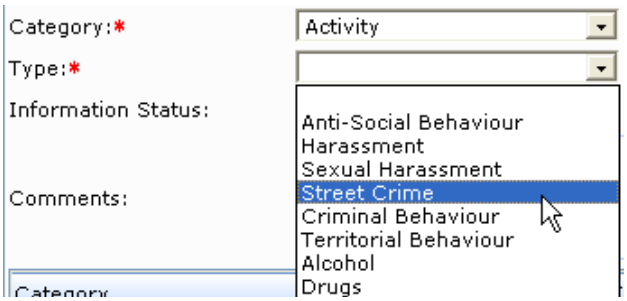


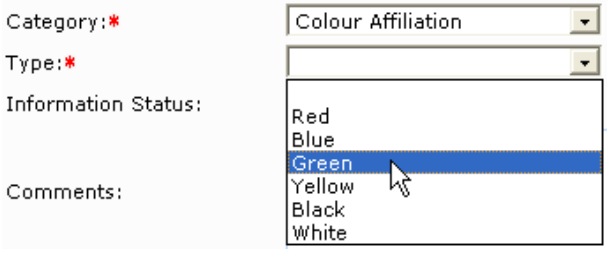
To Create a New Characteristic

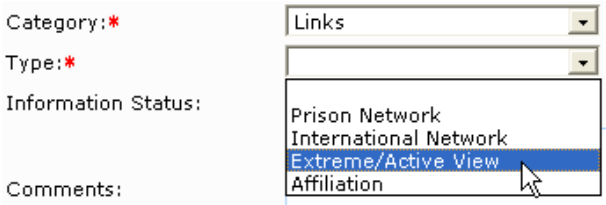
When the **Characteristic** tab is opened, the selected Group/Gang will display in the banner.

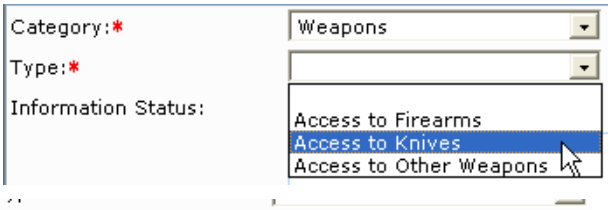


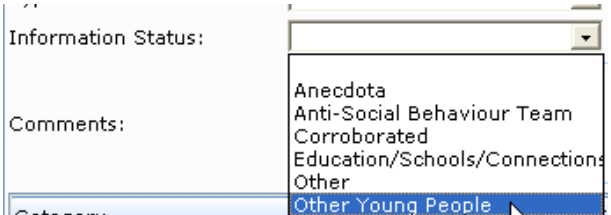
The **Category** and **Type** of Characteristic associated with a Group/Gang are mandatory fields. There are four different Categories, namely 'Activity', 'Colour Affiliation', 'Links' and 'Weapons'. The options displayed in the **Type** drop down list will depend upon what the user has selected for the Characteristic **Category**. All the available combinations are shown below:











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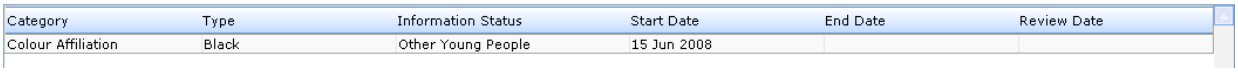
Once the Characteristic Category and Type have been chosen, choose an Information Status from the drop down list.

This refers to the way in which the information has come to light.

Start Date refers to date when it is known that the Characteristic became associated

Users can enter a **Review Date** at regular intervals as and when the Characteristics association is confirmed as ongoing, to display how recent the information is.

Any relevant notes can be entered into the **Comments** field, and clicking the Insert button saves the information. A pop-up message confirms 'the record has been successfully inserted' and the new Characteristic will appear in the list as below.



Category	Type	Information Status	Start Date	End Date	Review Date
Colour Affiliation	Black	Other Young People	15 Jun 2008		

To Edit an Existing Characteristic

To edit an existing Characteristic, single click on the entry in the list to highlight it. The related details will be displayed in the top section of the screen, and the Insert button at the bottom left hand corner of the screen will change to an Update button.

The user can make changes to the information fields as required before clicking the Update button to save the changes.

Again, a pop up message stating 'the record has been successfully updated' will confirm this.

Characteristics List Screen Buttons

When there is no Characteristic selected in the list, the Delete button will be disabled (greyed out). This button will become enabled once a Characteristic is selected in the list.

Clicking the Delete button will erase the Characteristic that is currently selected and highlighted within the list.

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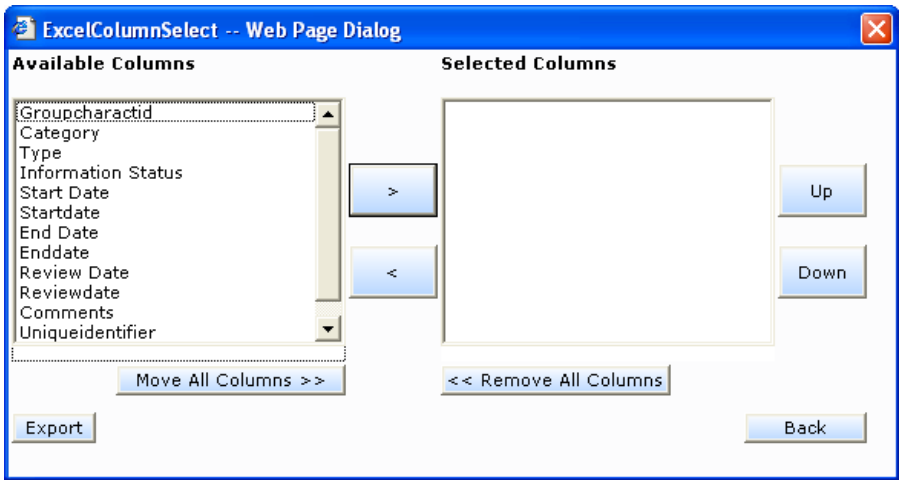
Clicking the Cancel button will clear the screen by deselecting the current Characteristic and removing the related information displayed in the fields, about the currently selected Characteristic.

Saving & Printing Characteristics

The Excel button at the bottom of the list screen enables the user to export the currently displayed list into Excel, so that the list can be saved and/or printed.

Clicking on the Excel button will open up a selection window as below. In this window, users can select which columns from the list need to be exported.



Users can click on an individual item in the 'Available Columns' list, to highlight, and click the > button to include it in the 'Selected Columns' list, repeating the process for each column required. Similarly, clicking the < button will move an item from the 'Selected Columns' list, back into the 'Available Columns' list.

Alternatively, clicking on Move All Columns >> or << Remove All Columns will shift the entire list from 'Available Columns' to 'Selected Columns' and vice versa.

If an item in the 'Selected Columns' list is selected (highlighted by single clicking), clicking on the Up and Down buttons will move the item up or down the list, altering the order of the columns as they will appear once they are exported into Excel.

Clicking on Back in this screen will return the user to the Characteristics list screen without having exported anything.

Once the required items from the list have been moved into 'Selected Columns', and depending upon the local settings of Microsoft Excel, clicking the Export button will either open an excel spreadsheet containing the exported information, or open a window as below:

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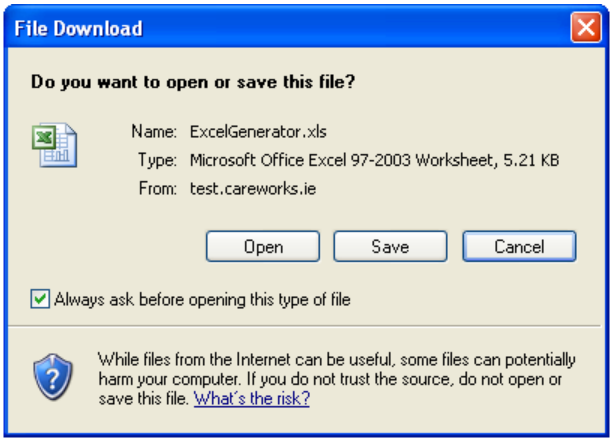
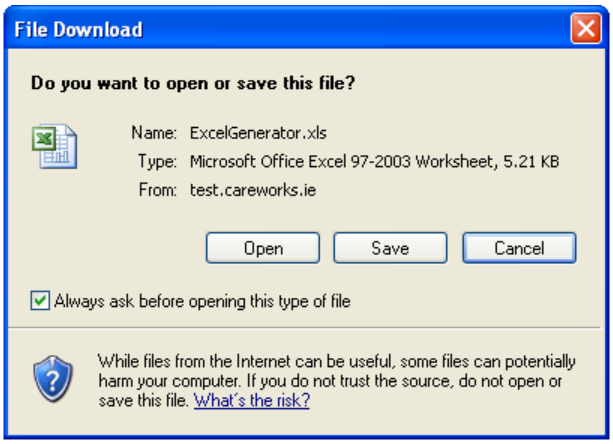

File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

At this point, clicking Save opens a window as below, enabling users to name the file, navigate to a suitable location and click Save


File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Clicking Cancel or Open at this stage will return the user to the Characteristics list screen without having exported anything.

Alternatively, clicking Open will display the exported information in an additional window on screen.

The Characteristics list will be displayed within the Excel spreadsheet as below.

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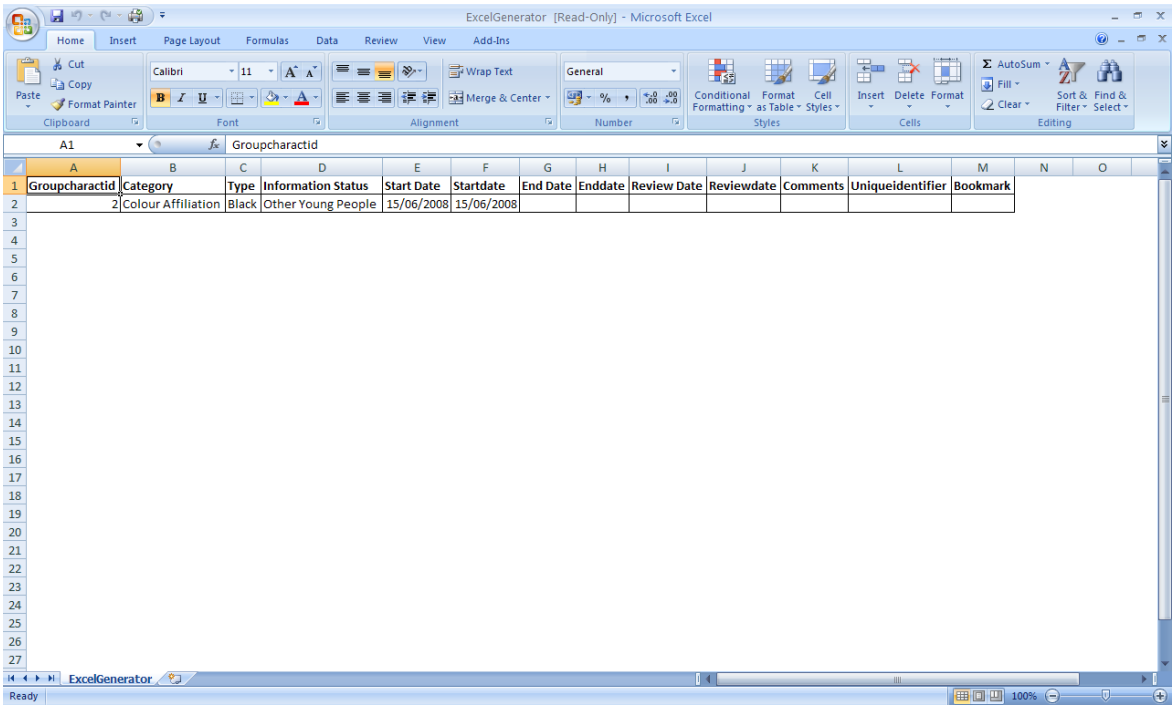

ExcelGenerator [Read-Only] - Microsoft Excel
Groupcharactid
Groupcharactid | Category | Type | Information Status | Start Date | Startdate | End Date | Enddate | Review Date | Reviewdate | Comments | Uniqueidentifier | Bookmark
2 | Colour Affiliation | Black | Other Young People | 15/06/2008 | 15/06/2008
ExcelGenerator
Ready

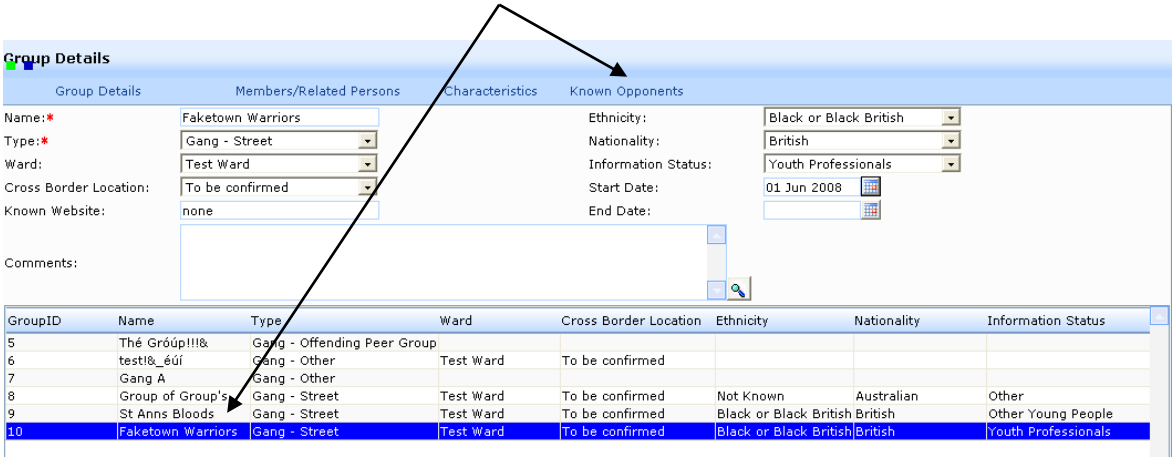
From this screen, a user with Excel knowledge can manipulate the columns and exported information further.

The information can be printed by clicking on the icon at the top of the screen, and the spreadsheet can also be saved from this screen, by clicking on File and Save As, before navigating to a suitable location and naming the file, as described above.

This screen is closed by clicking the in the top right hand corner.

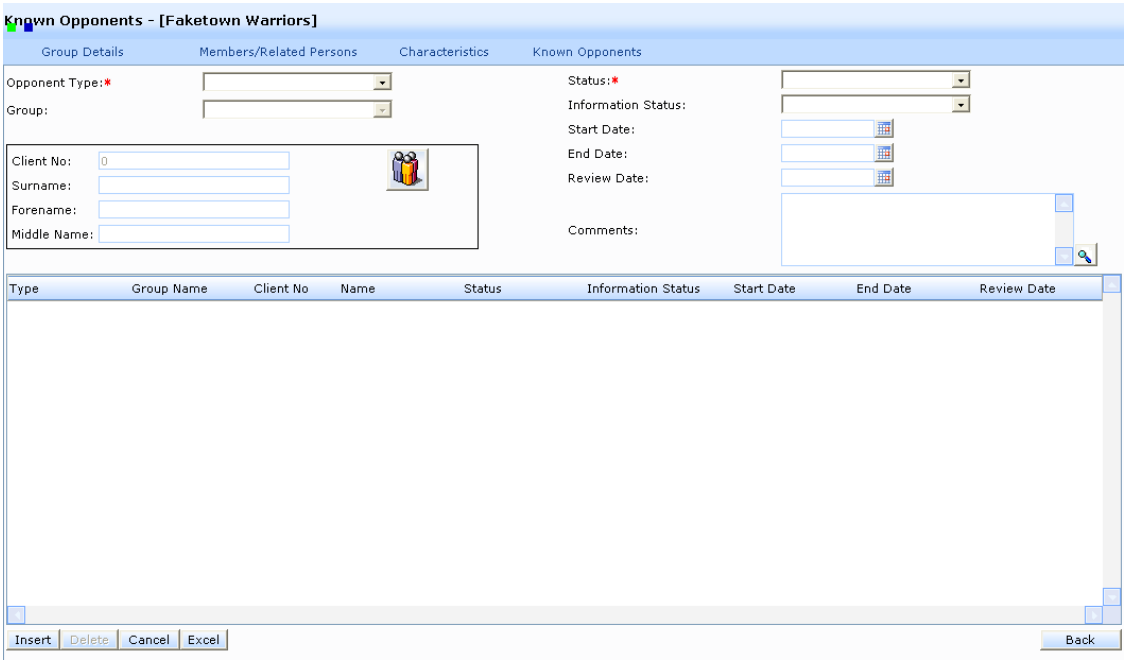
Known Opponents

Once a Group/Gang has been selected from the list on the Group Details list screen, the Known Opponents tab becomes enabled.


Group Details
Group Details
Members/Related Persons
Characteristics
Known Opponents
Name:* Faketown Warriors
Type:* Gang - Street
Ward: Test Ward
Cross Border Location: To be confirmed
Known Website: none
Comments:
Ethnicity: Black or Black British
Nationality: British
Information Status: Youth Professionals
Start Date: 01 Jun 2008
End Date:
GroupID | Name | Type | Ward | Cross Border Location | Ethnicity | Nationality | Information Status
5 | Thé Gróúp!!!& | Gang - Offending Peer Group
6 | test!&_éúí | Gang - Other | Test Ward | To be confirmed
7 | Gang A | Gang - Other
8 | Group of Group's | Gang - Street | Test Ward | To be confirmed | Not Known | Australian | Other
9 | St Anns Bloods | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Other Young People
10 | Faketown Warriors | Gang - Street | Test Ward | To be confirmed | Black or Black British | British | Youth Professionals

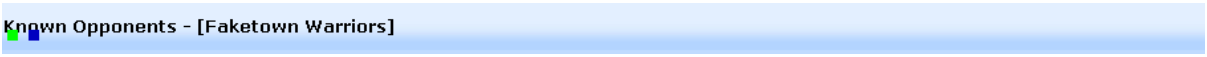
If there is no Group/Gang selected, the Known Opponents tab will be disabled (greyed out).

The Known Opponents tab allows a user to view all existing Opponents of a particular group or gang, edit details of an existing Opponent, and also create new ones.

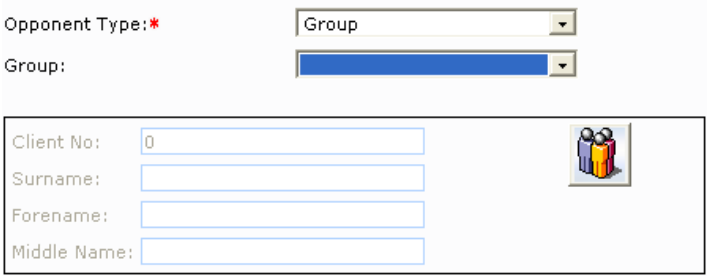


To Create a New Known Opponent

When the **Known Opponent** tab is opened, the selected Group/Gang will display in the banner.



The **Opponent Type** and **Status** of a Known Opponent associated with a Group/Gang are mandatory fields. There are two different Opponent Types, namely 'Group' and 'Person'.



If the **Opponent Type** 'Group' is selected, then the **Group** drop down list is activated and the Person Search section of the screen becomes disabled, as left.

In this case, the **Group** drop down list will show all other Groups/Gangs which exist, for the user to choose from. As such, if two Groups/Gangs exist as rivals to one another, both would need to be created in the Group Details tab, before adding them as Known Opponents on each Group's record.

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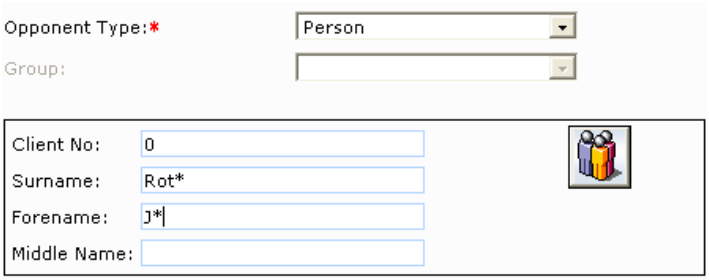
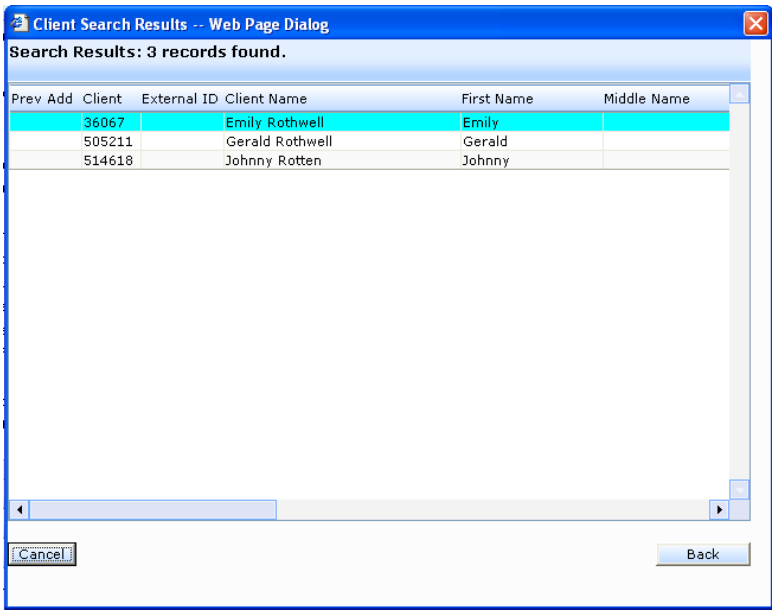


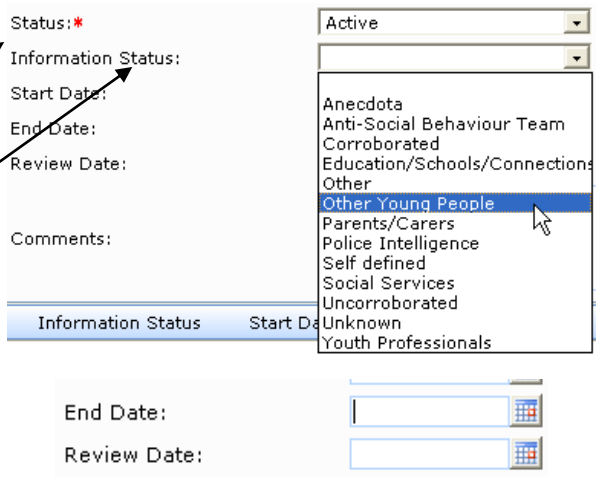
If the **Opponent Type** 'Person' is selected, the Group drop down list is disabled and the **Person Search** section of the screen becomes activated, as left

The user enters some name information as search criteria for the name of the person who is known to be an opponent of the Group/Gang, and clicks the button. A list of results matching the criteria will display as below:



Double clicking on the name of the person in the results list will then automatically enter their **Full Name** and **Client ID** number into the Known Opponents screen.

Once the Opponent Type has been selected, the user can enter a mandatory **Status** for the Known Opponent, as 'Active', 'Inactive' or 'Unknown'.



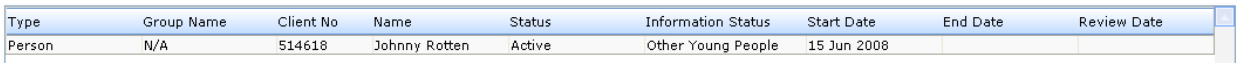
entered to indicate how the information came to li

Start Date refers to date when that person became a Known Opponent of the Group/Gang.

End Date refers to the date if/when it becomes known that the person has ceased to be an Opponent of the Group/Gang. This can be added at a later date if required.

Users can enter a **Review Date** at regular intervals as and when the persons association as a Known Opponent is confirmed as ongoing, to display how recent the information is.

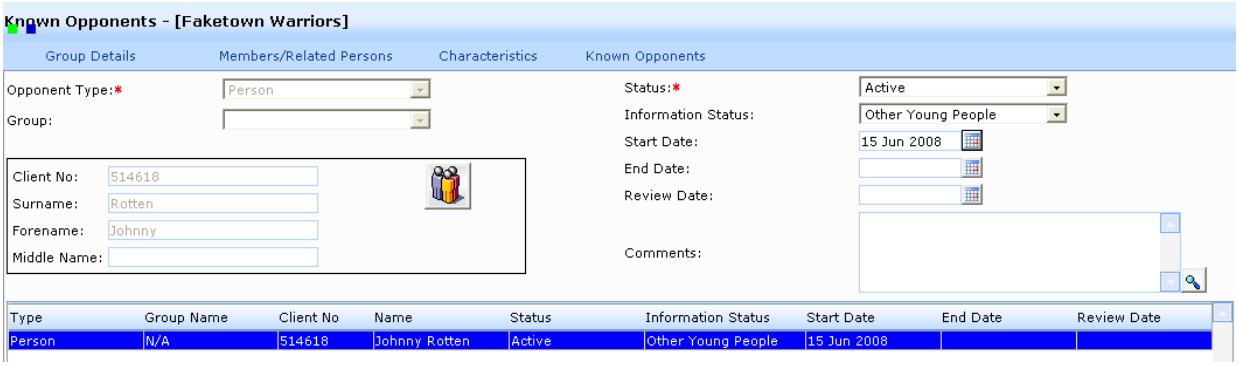
Any relevant notes can be entered into the **Comments** field, and clicking the Insert button saves the information. A pop-up message confirms 'the record has been successfully inserted' and the new Known Opponent will appear in the list as below.



Type	Group Name	Client No	Name	Status	Information Status	Start Date	End Date	Review Date
Person	N/A	514618	Johnny Rotten	Active	Other Young People	15 Jun 2008		

To Edit an Existing Known Opponent

To edit an existing Known Opponent, single click on the entry in the list to highlight it. The related details will be displayed in the top section of the screen, and the Insert button at the bottom left hand corner of the screen will change to an Update button.



The user can make changes to the information fields as required before clicking the Update button to save the changes.

Again, a pop up message stating 'the record has been successfully updated' will confirm this.

Known Opponents List screen buttons

When there is no Characteristic selected in the list, the Delete button will be disabled (greyed out). This button will become enabled once a Known Opponent is selected in the list.

Clicking the Delete button will erase the Known Opponent that is currently selected and highlighted within the list.

Note: Clicking Delete will only erase the Person's association with the Group/Gang – it will **not** erase their client record from Personal Details.

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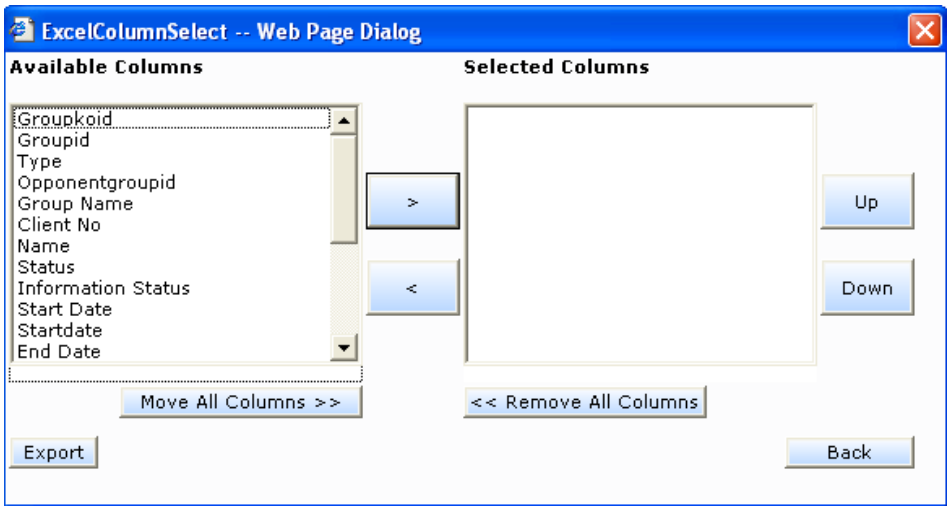
Clicking the Cancel button will clear the screen by deselecting the current Characteristic and removing the related information displayed in the fields, about the currently selected Characteristic.

Saving & Printing Known Opponents

The Excel button at the bottom of the list screen enables the user to export the currently displayed list into Excel, so that the list can be saved and/or printed.

Clicking on the Excel button will open up a selection window as below. In this window, users can select which columns from the list need to be exported.



Users can click on an individual item in the 'Available Columns' list, to highlight, and click the > button to include it in the 'Selected Columns' list, repeating the process for each column required. Similarly, clicking the < button will move an item from the 'Selected Columns' list, back into the 'Available Columns' list.

Alternatively, clicking on Move All Columns >> or << Remove All Columns will shift the entire list from 'Available Columns' to 'Selected Columns' and vice versa.

If an item in the 'Selected Columns' list is selected (highlighted by single clicking), clicking on the Up and Down buttons will move the item up or down the list, altering the order of the columns as they will appear once they are exported into Excel.

Clicking on Back in this screen will return the user to the Known Opponents list screen without having exported anything.

Once the required items from the list have been moved into 'Selected Columns', and depending upon the local settings of Microsoft Excel, clicking the Export button will either open an excel spreadsheet containing the exported information, or open a window as below:

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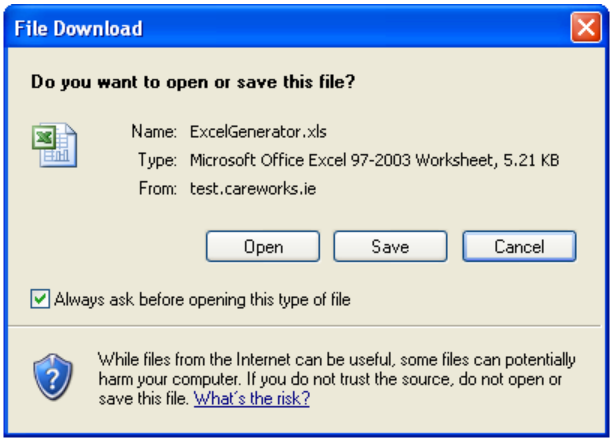
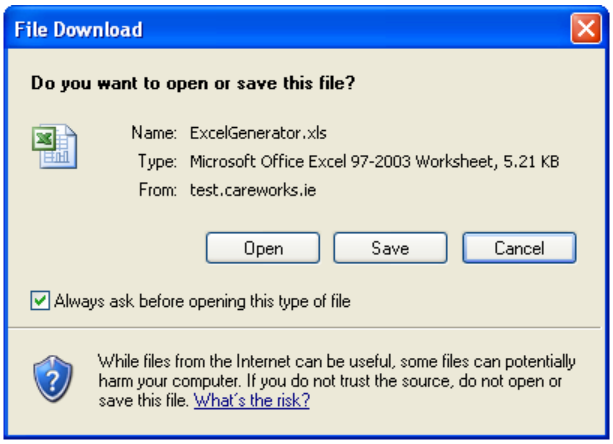

File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

At this point, clicking Save opens a window as below, enabling users to name the file, navigate to a suitable location and click Save


File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Clicking Cancel or Open at this stage will return the user to the Known Opponents list screen without having exported anything.

Alternatively, clicking Open will display the exported information in an additional window on screen.

The Known Opponents list will be displayed within the Excel spreadsheet as below.

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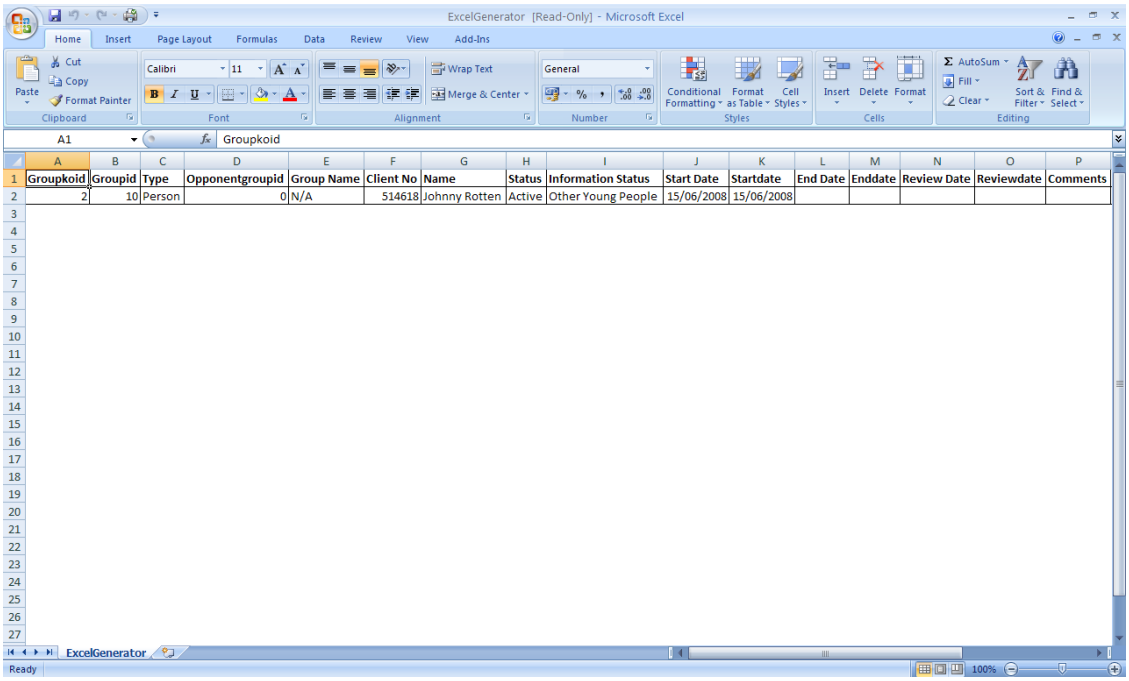
ExcelGenerator [Read-Only] - Microsoft Excel
Groupkoid
Groupkoid Groupid Type Opponentgroupid Group Name Client No Name Status Information Status Start Date Startdate End Date Enddate Review Date Reviewdate Comments
2 10 Person 0 N/A 514618 Johnny Rotten Active Other Young People 15/06/2008 15/06/2008
ExcelGenerator
Ready

From this screen, a user with Excel knowledge can manipulate the columns and exported information further.

The information can be printed by clicking on the icon at the top of the screen, and the spreadsheet can also be saved from this screen, by clicking on File and Save As, before navigating to a suitable location and naming the file, as described above.

This screen is closed by clicking the in the top right hand corner.

Events/Incidents Module

The Events/Incidents module enables user to view existing and enter new known events or incidents which have taken or are planned to take place.

These events/incidents may involve a whole Group/Gang or one or more Members/Related Persons or Known Opponents, who can also be added by the user, in association with the relevant event/incident.

Users are also able to enter details of any follow up actions taken as a result, if relevant.

When the Events/Incidents module is selected on the CareDirector Youth tree, the Events/Incidents list screen will be displayed, showing all events and incidents in existence, as below.

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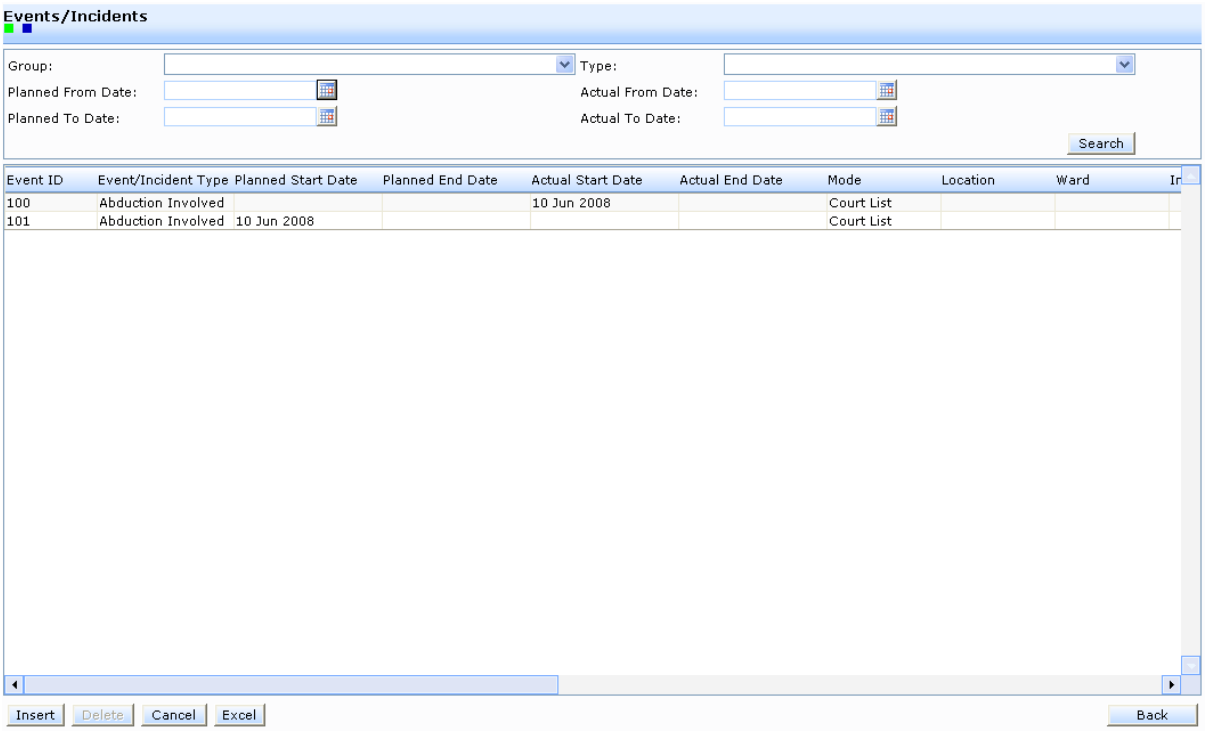
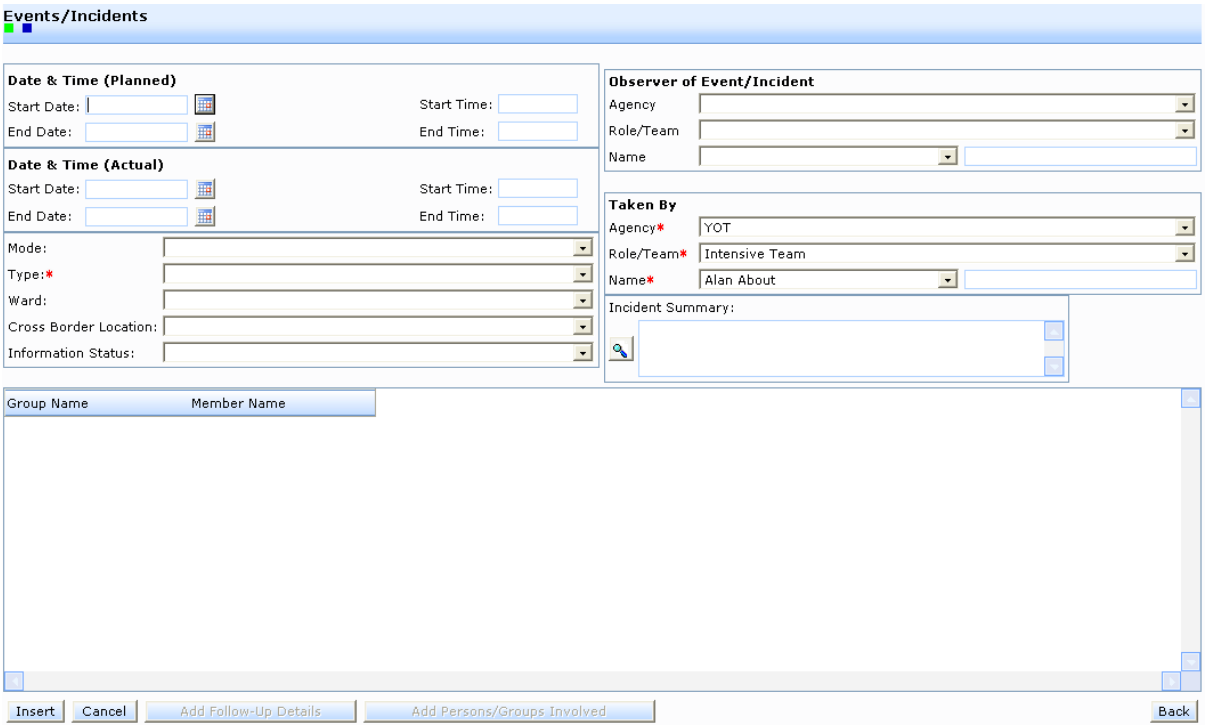
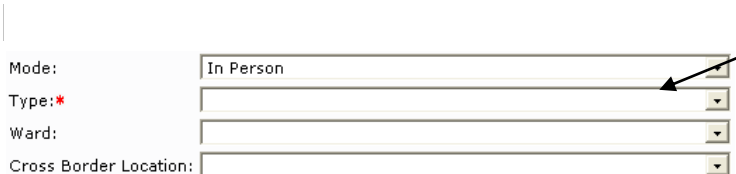


To Create a New Event/Incident

To create a new Event/Incident, first click on the Insert button at the bottom left hand corner of the screen. This will open up a blank Event/Incidents form:

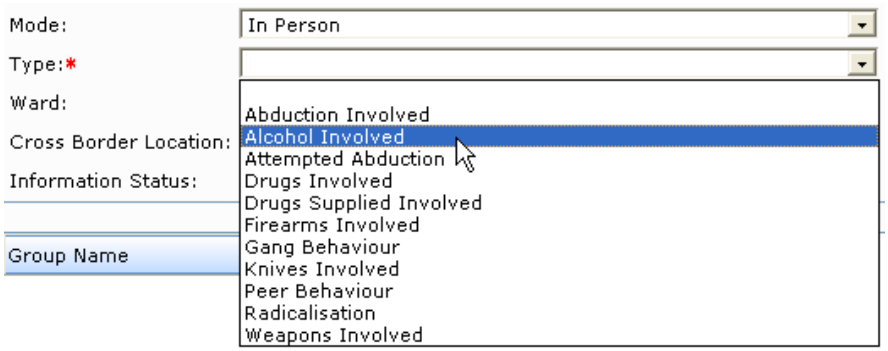


If the Event/Incident is known to be occurring in the future, the **Planned Start, End Dates** and **Times** can be entered. If the Event/Incident has already occurred, **Actual Start, End Dates** are entered.



The **Mode** in which the information came to light can be entered. Options match those listed in the referral screen field 'mode').

Information Status is also in relation to how the information came to light, and the options listed are the same wherever this field exists in other screens.



The **Type** of Event/Incident is mandatory, and is selected from the options in the drop down list.

Ward refers to an area where the Event/Incident is taking or has taken place, if relevant. This field displays the same list as in the Ward field in Personal Details.

The **Cross Border Location** field is also a drop down list field. The YJB intend this field to be used to record where the group originates from outside of the local authority borders. The options that display in this list are locally controlled, so this field can also be used to record varied detail about the Group location:

- Where the Group location originates from outside of the local authority borders
- Where the Group location is within local authority borders, but not Ward specific, for example, where the group area covers more than one ward
- Where the Group location is within local authority borders, but in a smaller area within a ward, for example, the name of a particular neighbourhood or estate

The lists in the **Agency**, **Role/Team** and **Name** fields here match those of the same name found in other screens throughout the system, such as in Contacts and Referrals. There is also a free text field for name in addition to the drop down list, in relation to each of these.

Free text detail about the Event/Incident can be entered into the **Incident Summary** field, which can be expanded on screen using the (zoom) button. Once the zoom screen has been opened, the user is able to spell check the information using the Spell button.

Note: Clicking OK in the zoom screen is not the same as saving the changes. This will return the user to the Event/Incidents screen and clicking Insert or Update as applicable will save the changes made in both the main screen and the zoom screen.

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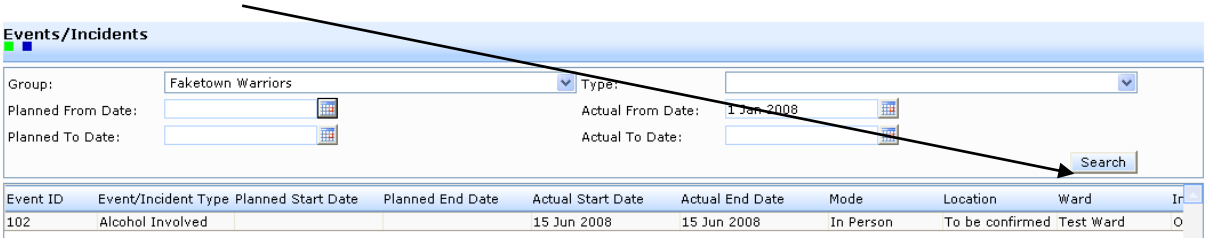
Once all the relevant information has been entered, clicking on Insert will save the Event/Incident details, and a message will confirm that 'the record has been successfully inserted'.

Clicking the Back button in this screen returns the user to the Events/Incidents list screen, displayed on first entering the module.

Searching Events/Incidents

At the top of the Events/Incidents list screen, there is a search area, containing a number of search criteria fields and a search button.

Here, users can enter as little or as much information as desired, and clicking the Search button will filter the list below to return any matching results.



In the above example, one result has been returned in the list for an 'Actual' Event/Incident with Faketown Warriors involvement, since 1st Jan 2008.

By double clicking the Event/Incident in the list, the details screen will be opened to enable the user to access further information recorded about the Event/Incident.

When the filtered/post-search list is displayed in the Events/Incidents list screen, and the Cancel button is clicked, any search criteria selected in the top section of the screen is cleared and the list in the bottom section is refreshed, returning to the full list of all existing Events/Incidents.

Saving & Printing a List of Events/Incidents

The Excel button at the bottom of the list screen enables the user to export the currently displayed list into Excel, so that the list can be saved and/or printed.

This can be done when the full list of all existing Events/Incidents is displayed, or after a search.

Clicking on the Excel button will open up a selection window as below. In this window, users can select which columns from the list need to be exported.

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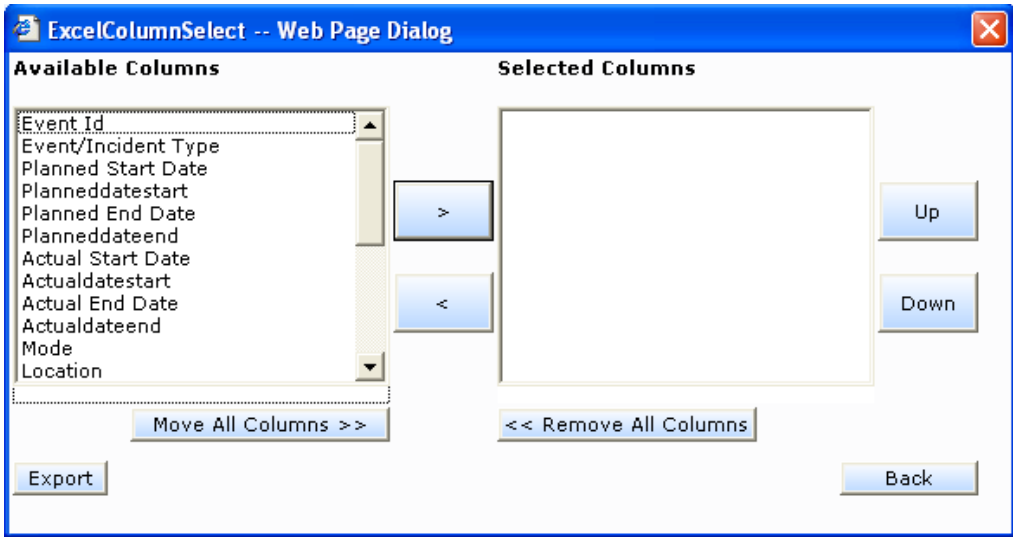


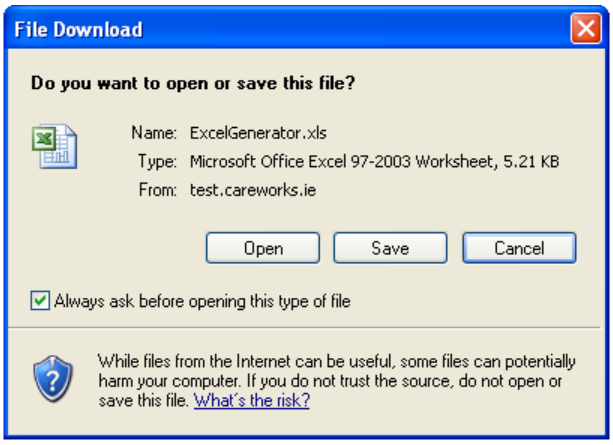
Users can click on an individual item in the 'Available Columns' list, to highlight, and click the > button to include it in the 'Selected Columns' list, repeating the process for each column required. Similarly, clicking the < button will move an item from the 'Selected Columns' list, back into the 'Available Columns' list.

Alternatively, clicking on Move All Columns >> or << Remove All Columns will shift the entire list from 'Available Columns' to 'Selected Columns' and vice versa.

If an item in the 'Selected Columns' list is selected (highlighted by single clicking), clicking on the Up and Down buttons will move the item up or down the list, altering the order of the columns as they will appear once they are exported into Excel.

Clicking on Back in this screen will return the user to the Known Opponents list screen without having exported anything.

Once the required items from the list have been moved into 'Selected Columns', and depending upon the local settings of Microsoft Excel, clicking the Export button will either open an excel spreadsheet containing the exported information, or open a window as below:


File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

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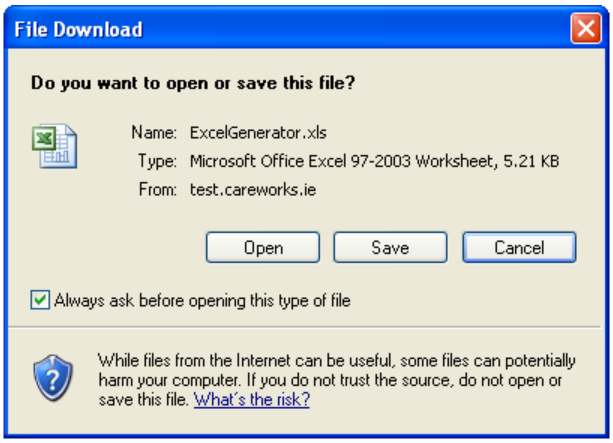
At this point, clicking Save opens a window as below, enabling users to name the file, navigate to a suitable location and click Save


File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Clicking Cancel or Open at this stage will return the user to the Known Opponents list screen without having exported anything.

Alternatively, clicking Open will display the exported information in an additional window on screen.

The Events / Incidents list will be displayed within the Excel spreadsheet as below.

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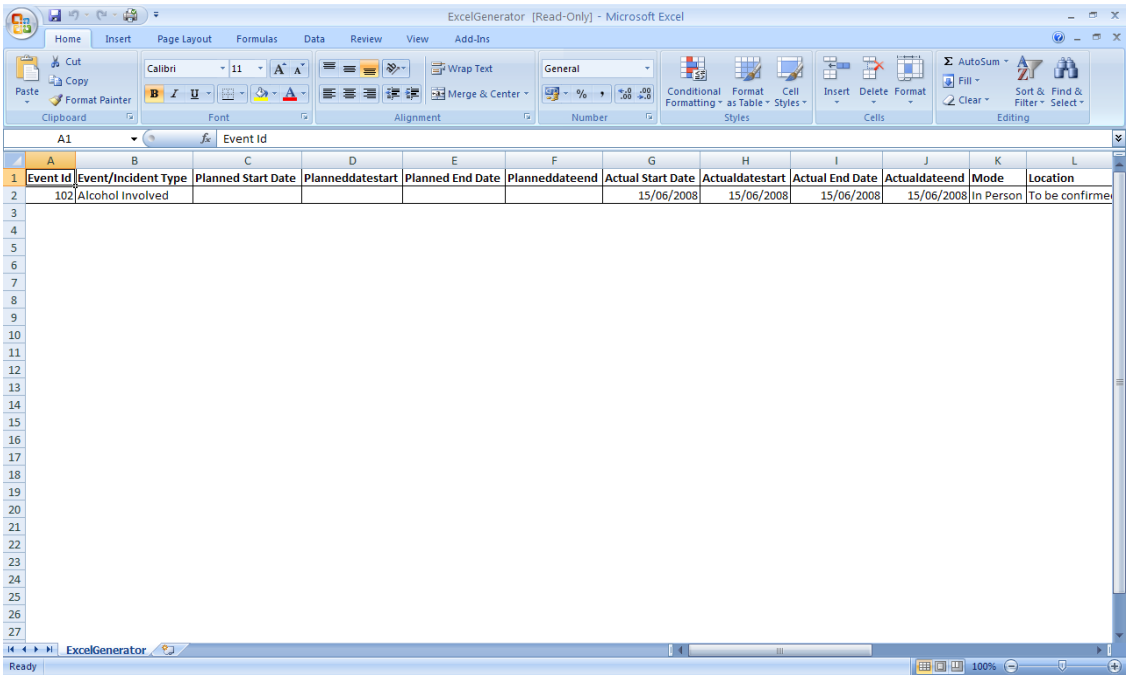

ExcelGenerator [Read-Only] - Microsoft Excel
Event Id
Event Id | Event/Incident Type | Planned Start Date | Planneddatestart | Planned End Date | Planneddateend | Actual Start Date | Actualdatestart | Actual End Date | Actualdateend | Mode | Location
102 | Alcohol Involved | | | | | 15/06/2008 | 15/06/2008 | 15/06/2008 | 15/06/2008 | In Person | To be confirme
ExcelGenerator
Ready

From this screen, a user with Excel knowledge can manipulate the columns and exported information further.

The information can be printed by clicking on the icon at the top of the screen, and the spreadsheet can also be saved from this screen, by clicking on File and Save As, before navigating to a suitable location and naming the file, as described above.

This screen is closed by clicking the in the top right hand corner.

Editing an Existing Event/Incident

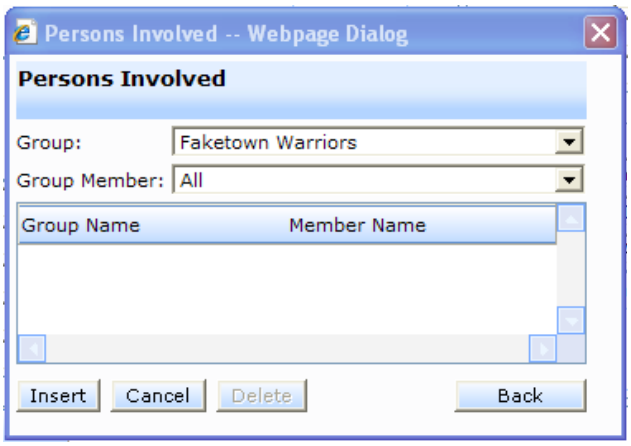
On entering the Events/Incidents module, the user must first locate the record for the existing Event/Incident in the list, either by scrolling down the list or using the search facility described above.

Double clicking on the entry in the list will open the Event/Incident details screen. From this screen, any changes can be made before clicking Update to save them.

Note: If a planned Event/Incident is already entered, and later, it becomes known that the Event/Incident did in fact take place, then the user can re-open the existing record for the planned Event/Incident and add the Actual Dates, before clicking Update to save the new information.

Persons/Groups Involved in an Event/Incident

To add information about people involved in the Event/Incident, locate the Event/Incident in the list screen and double click it to open the details screen. From here, click on the Add Persons/Groups Involved button at the bottom of the Event/Incident Details screen. This will open a pop-up window as below:



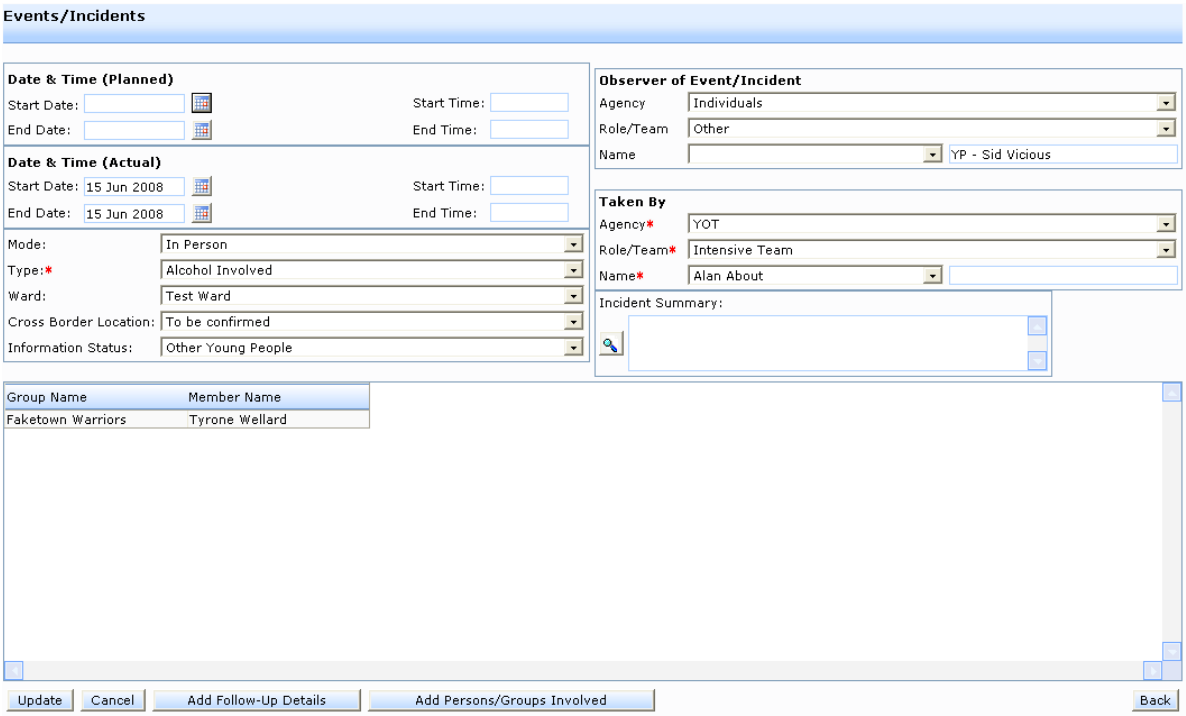
The **Group** field lists all the existing Groups/Gangs.

The **Group Member** field lists each individual recorded as being Members/Related Persons, who can be added individually, or 'All' can be selected instead as shown

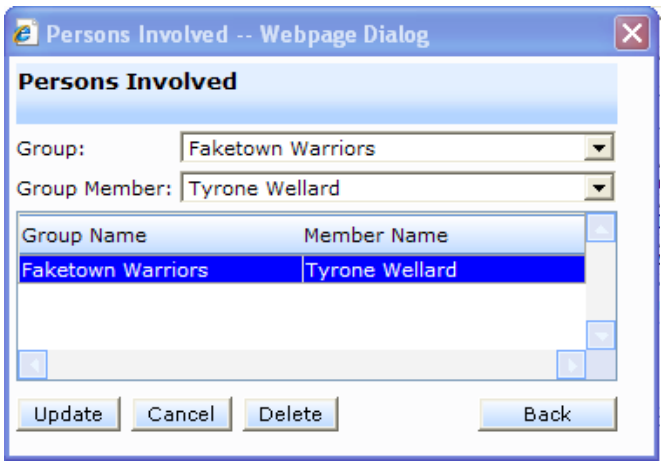
Clicking Insert saves the entry. A pop-up message will confirm that 'the record has been successfully inserted' and it will appear in the list at the bottom of this window, viewable by using the scroll bars.

Multiple entries can be made to this Persons Involved screen as required.

Clicking Back in this window returns the user to the Event/Incident details screen, and any Person/Groups added are displayed within the bottom half of the screen as below:



To edit an entry for a Person/Group involved, double click on the entry in the bottom half of the Events/Incidents details screen (above), to reopen the Persons/Groups Involved window shown below.



Highlight the Group/Person in the list by single clicking and their detail will be displayed in the fields at the top of the window.

Make any changes as required and click the Update button to save them.

Similarly, if an entry needed to be deleted, the user would highlight the Group/Person in the list as above, and click Delete. On returning to the Events/Incidents list screen, the Groups/Persons Involved will have updated in the bottom half of the screen.

Clicking Cancel in this window will simply clear the Group and Group Member fields in the top of the window.

Follow-Up Details of an Event/Incident

Dependent upon the type of event/incident that is known, it may be appropriate for a worker to take one or more 'follow-up' courses of action as a result of the event/incident. In this instance, a user can record such actions against the Event/Incident as follows.

First, the user must locate the Event/Incident in the list screen and double click it to open the details screen. From here, click on the Add Follow-Up Details button at the bottom of the Event/Incident Details screen. This will open a pop-up window as below:

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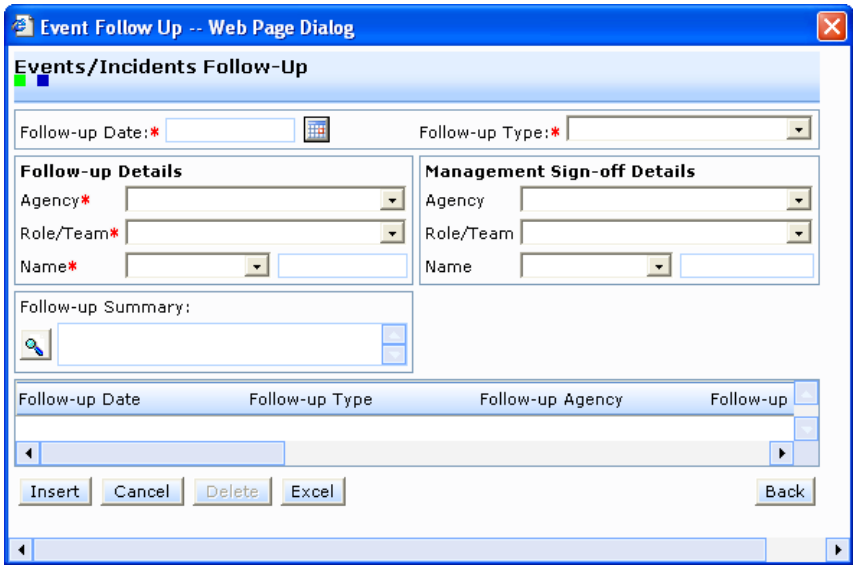

Follow-up Date is the date that the follow- up action took place.

Follow-Up Type has default values such as Referral to Education, Police, YOT, YIP and Children's Service. These can be added to locally, with others.

Follow-Up Details refer to the worker who carried out the follow-up action, and again, the **Agency, Role/Team** and **Name** drop down lists will display the same options as Agency, Role/Team and Name fields throughout the system.

Management Sign-off Details can be completed if the follow-up action was discussed or authorised by a Team Manager, to record the same.

Comments to explain the follow-up action can be free text typed into **Follow-Up Summary**.

Once the relevant information is entered, clicking Insert saves the entry. A pop-up message will confirm that 'the record has been successfully inserted' and it will appear in the list at the bottom of the follow-up window, viewable by using the scroll bars.

Multiple entries can be made to this Follow Up screen as required.

Clicking Back in this window returns the user to the Event/Incident details screen as below:

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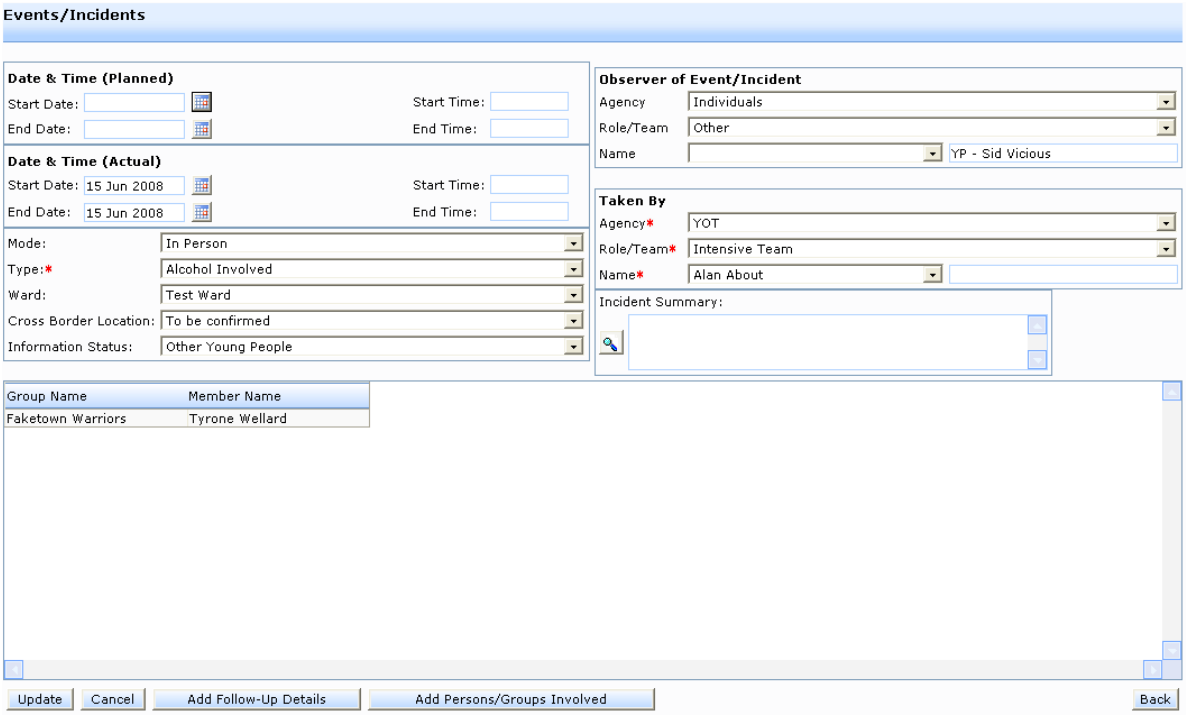
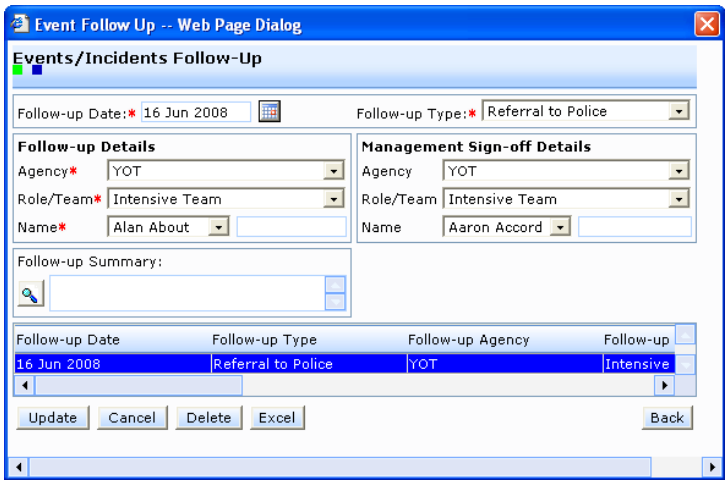


To edit an entry for Follow-Up action, click Add Follow-Up Details again at the bottom of the Events/Incidents details screen (above), to reopen the Follow-Up action window shown below.



Highlight the Follow-up entry in the list by single clicking and the detail will be displayed in the fields at the top of the window.

Make any changes as required and click the Update button to save.

Similarly, if a follow-up entry needed to be deleted, the user would highlight the Follow-Up action in the list as above, and click Delete.

Clicking Cancel in this window will simply clear all the fields in the window, with just the list remaining displayed.

The Excel button at the bottom of this window enables the user to export the list of follow-up actions into Excel, so that the list can be saved and/or printed.

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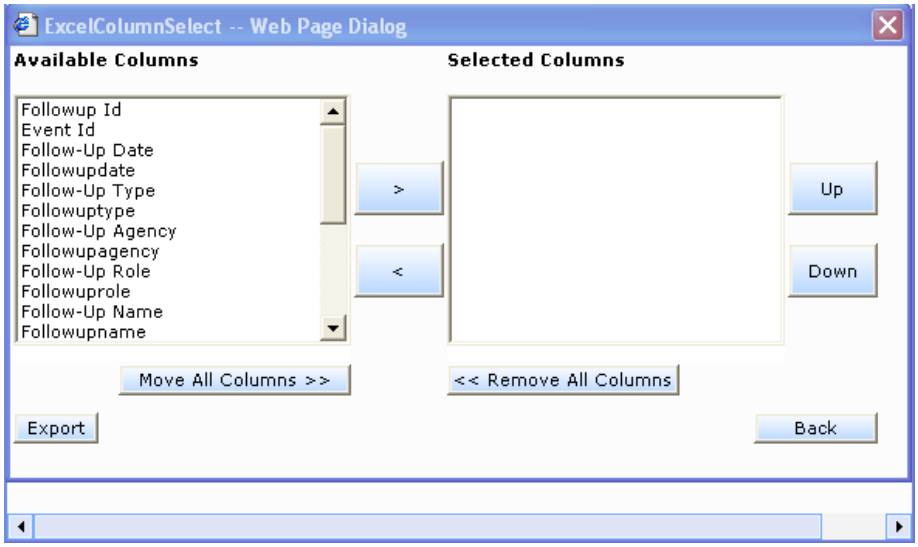
Clicking on the Excel button will open up a selection window as below. In this window, users can select which columns from the list need to be exported.



Users can click on an individual item in the 'Available Columns' list, to highlight, and click the > button to include it in the 'Selected Columns' list, repeating the process for each column required. Similarly, clicking the < button will move an item from the 'Selected Columns' list, back into the 'Available Columns' list.

Alternatively, clicking on Move All Columns >> or << Remove All Columns will shift the entire list from 'Available Columns' to 'Selected Columns' and vice versa.

If an item in the 'Selected Columns' list is selected (highlighted by single clicking), clicking on the Up and Down buttons will move the item up or down the list, altering the order of the columns as they will appear once they are exported into Excel.

Clicking on Back in this screen will return the user to the Known Opponents list screen without having exported anything.

Once the required items from the list have been moved into 'Selected Columns', and depending upon the local settings of Microsoft Excel, clicking the Export button will either open an excel spreadsheet containing the exported information, or open a window as below:

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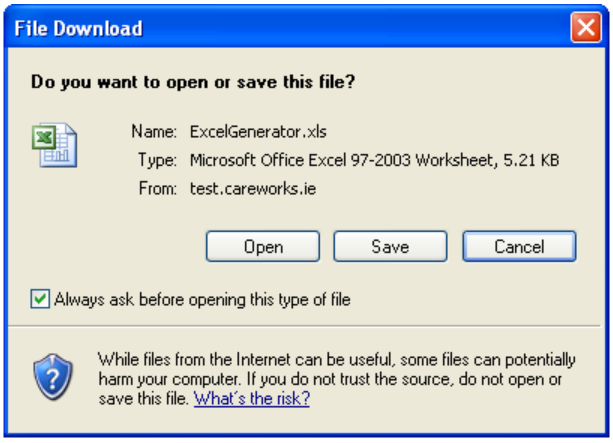
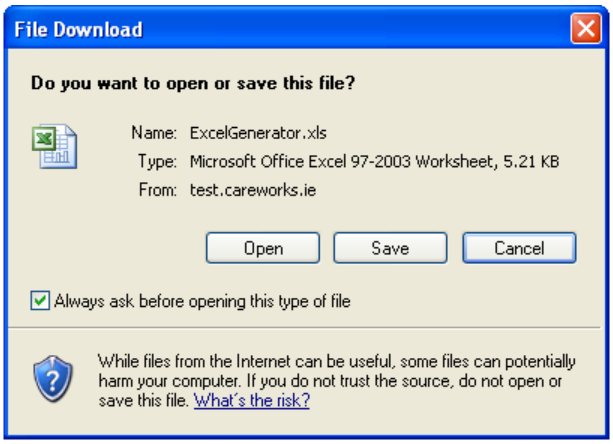

File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

At this point, clicking Save opens a window as below, enabling users to name the file, navigate to a suitable location and click Save


File Download
Do you want to open or save this file?
Name: ExcelGenerator.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 5.21 KB
From: test.careworks.ie
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Clicking Cancel or Open at this stage will return the user to the Known Opponents list screen without having exported anything.

Alternatively, clicking Open will display the exported information in an additional window on screen.

The Follow-Up actions list will be displayed within the Excel spreadsheet as below.

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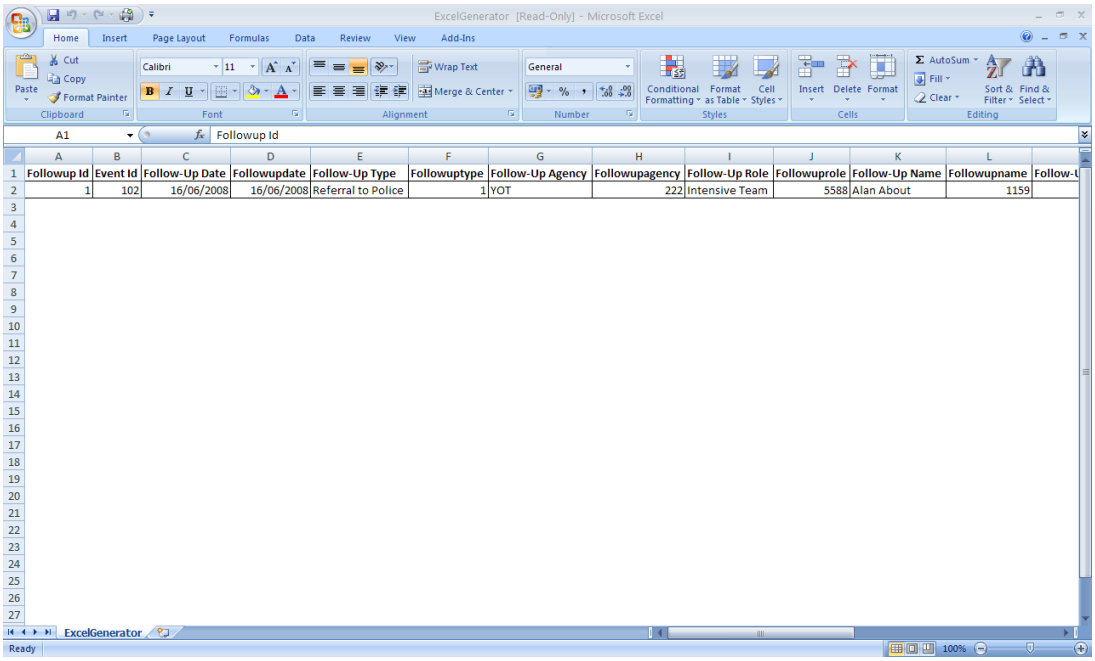
ExcelGenerator [Read-Only] - Microsoft Excel
Home
Insert
Page Layout
Formulas
Data
Review
View
Add-Ins
A1
Followup Id
Followup Id | Event Id | Follow-Up Date | Followupdate | Follow-Up Type | Followuptype | Follow-Up Agency | Followupagency | Follow-Up Role | Followuprole | Follow-Up Name | Followupname
1 | 102 | 16/06/2008 | 16/06/2008 | Referral to Police | 1 | YOT | 222 | Intensive Team | 5588 | Alan About | 1159
ExcelGenerator
Ready

From this screen, a user with Excel knowledge can manipulate the columns and exported information further.

The information can be printed by clicking on the icon at the top of the screen, and the spreadsheet can also be saved from this screen, by clicking on File and Save As, before navigating to a suitable location and naming the file, as described above.

This screen is closed by clicking the in the top right hand corner.

Group/Gang Related Offences

When adding an offence for a client that is known to be Group/Gang related, this can be recorded with the offence information, as long as the Group/Gang has already been created within the Groups module (as outlined above).

The offence screen is accessed as usual, by searching for the client, creating or selecting an existing referral as appropriate, and opening the Offences module on the CareDirector Youth tree, to display the Offences screen as below:

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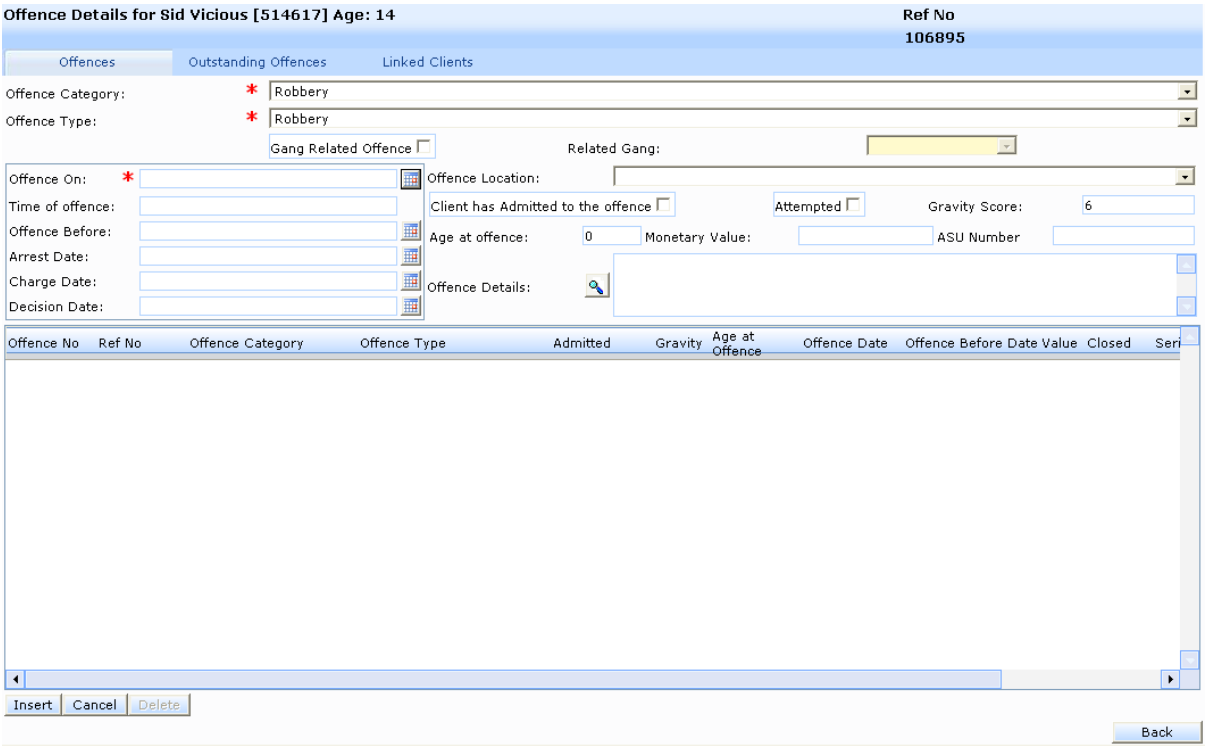
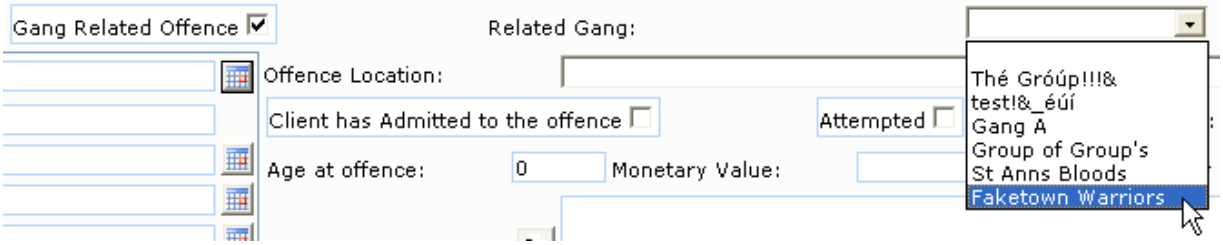


The **Related Gang** field is a drop down list which is disabled by default on entry to the screen. Once the **Gang Related Offence** tick box has been manually ticked, by single clicking, the **Related Gang** drop down list becomes enabled, as below:



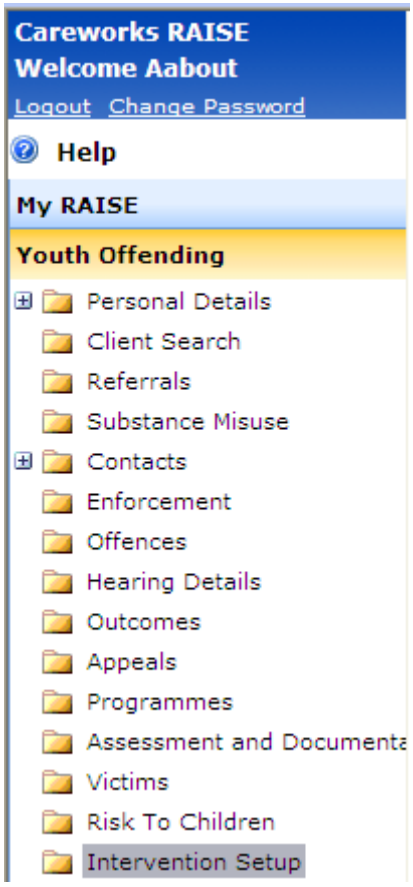
The Related Gang list will display all existing Groups/Gangs within the Group module. If the relevant Group/Gang is not listed here when the user attempts to enter a Group/Gang related offence, the user will need to create the Group/Gang within the Group module as described above.

Other details on the Offence screen are entered as usual, and inserted or updated. (See Fundamentals for further detail on adding offences).

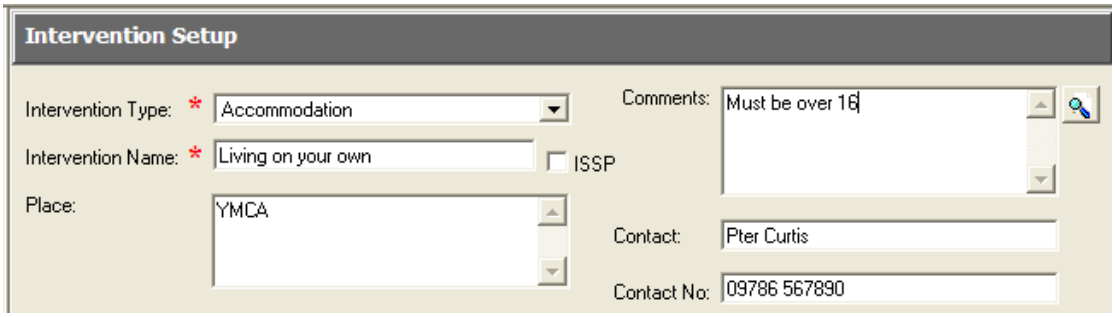
Chapter 16) Intervention Setup

The Intervention Setup module allows practitioners and administrator to create individual or custom interventions within the existing interventions framework. It can be used for both ISSP schedules and normal contacts.

You click on the Intervention Setup in the menu:



To add an Intervention complete the necessary fields:



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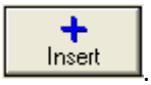
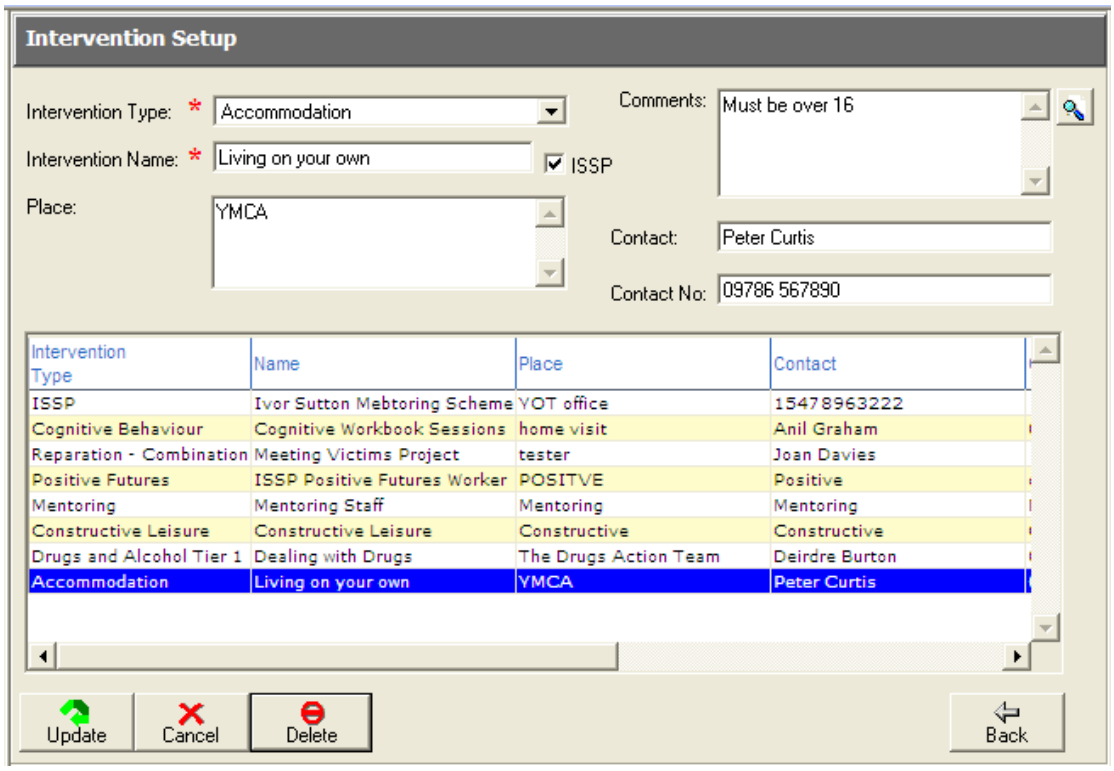
If you want the Intervention to count towards the ISSP schedule of 25 hours you need to tick the box marked ISSP:

Once you have completed you click on 

. The Intervention will be entered in the grid below:


Intervention Setup
Intervention Type: * Accommodation
Intervention Name: * Living on your own
ISSP
Place: YMCA
Comments: Must be over 16
Contact: Peter Curtis
Contact No: 09786 567890
Intervention Type
Name
Place
Contact
ISSP Ivor Sutton Mebtoring Scheme YOT office 15478963222
Cognitive Behaviour Cognitive Workbook Sessions home visit Anil Graham
Reparation - Combination Meeting Victims Project tester Joan Davies
Positive Futures ISSP Positive Futures Worker POSITVE Positive
Mentoring Mentoring Staff Mentoring Mentoring
Constructive Leisure Constructive Leisure Constructive Constructive
Drugs and Alcohol Tier 1 Dealing with Drugs The Drugs Action Team Deirdre Burton
Accommodation Living on your own YMCA Peter Curtis
Update
Cancel
Delete
Back

Once an Intervention has been set up in this module it can be applied within the Intervention section of the Contacts module:

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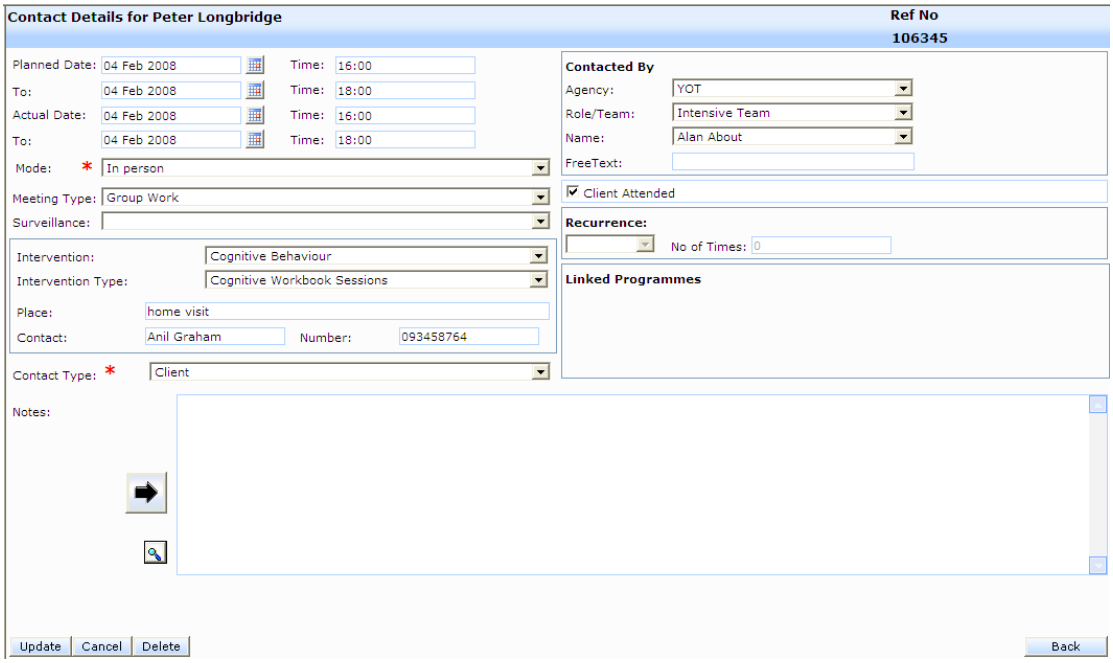
Contact Details for Peter Longbridge
Ref No
106345
Planned Date: 04 Feb 2008
Time: 16:00
To: 04 Feb 2008
Time: 18:00
Actual Date: 04 Feb 2008
Time: 16:00
To: 04 Feb 2008
Time: 18:00
Mode: *
In person
Meeting Type: Group Work
Surveillance:
Intervention: Cognitive Behaviour
Intervention Type: Cognitive Workbook Sessions
Place: home visit
Contact: Anil Graham
Number: 093458764
Contact Type: *
Client
Contacted By
Agency: YOT
Role/Team: Intensive Team
Name: Alan About
FreeText:
Client Attended
Recurrence:
No of Times: 0
Linked Programmes
Notes:
Update
Cancel
Delete
Back

Chapter 17) Looked After Children

This module allows you to record the status of any Looked After Children and to record whether they are 'eligible' or 'relevant' as under the Children (Leaving Care) Act 2000. This function is carried out by the practitioner and other assigned staff. This module is used for the Youth Justice Board Performance Measures.

To access Looked After Children you single click on the appropriate icon on the left hand side of the screen:

This will open up the following screen:

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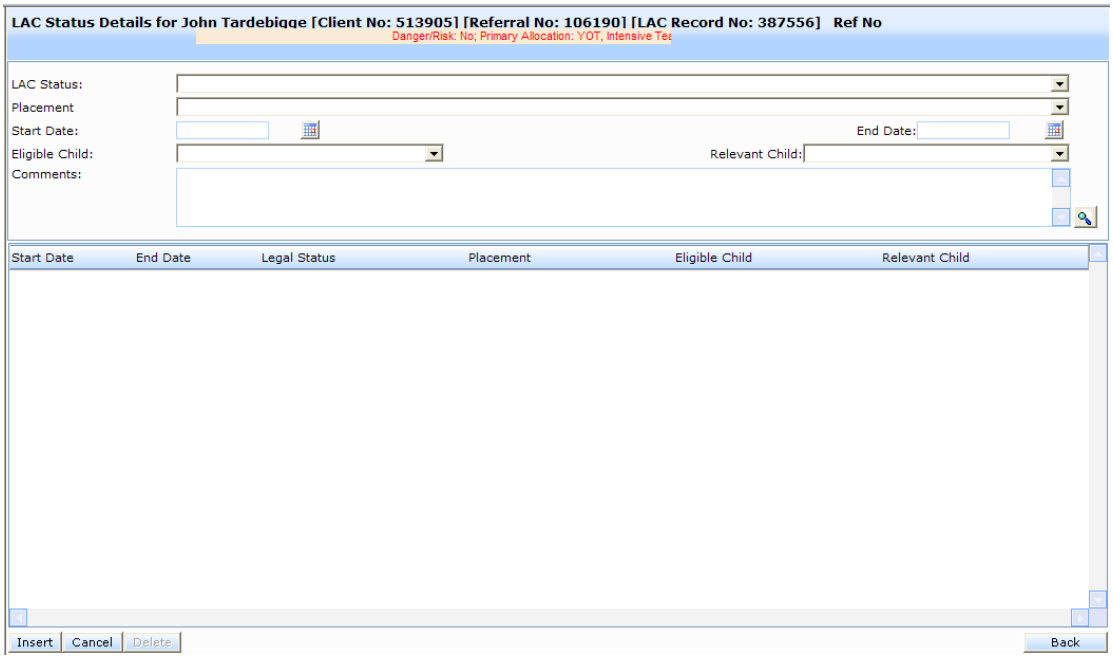
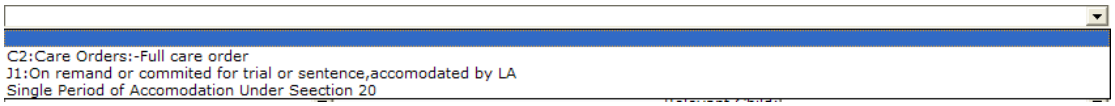
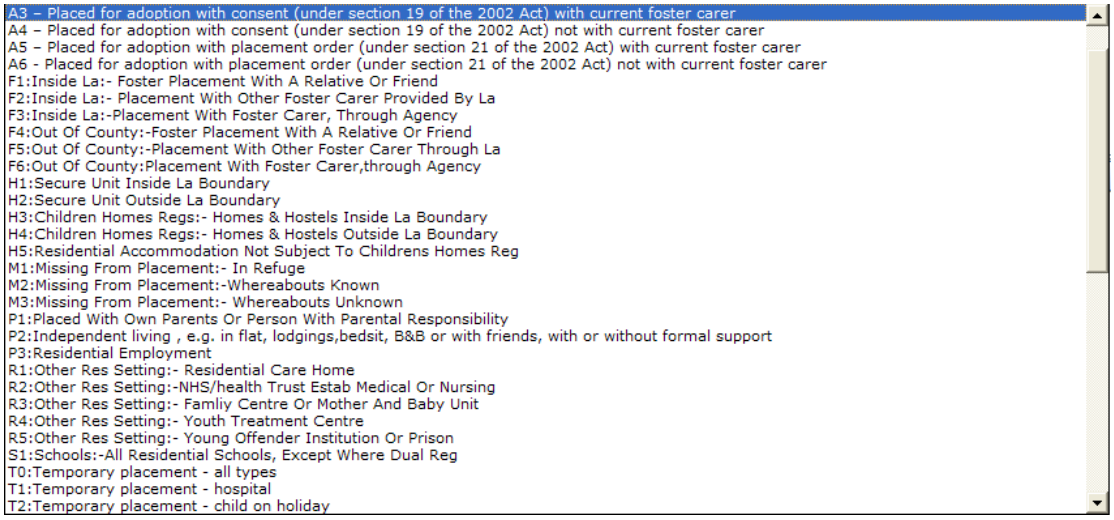


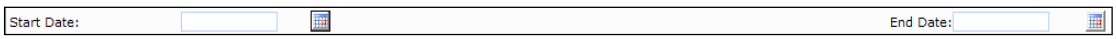
You enter the relevant LAC Status:


C2:Care Orders:-Full care order
J1:On remand or commited for trial or sentence,accomodated by LA
Single Period of Accomodation Under Seection 20

You would next identify the Placement:


A3 – Placed for adoption with consent (under section 19 of the 2002 Act) with current foster carer
A4 – Placed for adoption with consent (under section 19 of the 2002 Act) not with current foster carer
A5 – Placed for adoption with placement order (under section 21 of the 2002 Act) with current foster carer
A6 - Placed for adoption with placement order (under section 21 of the 2002 Act) not with current foster carer
F1:Inside La:- Foster Placement With A Relative Or Friend
F2:Inside La:- Placement With Other Foster Carer Provided By La
F3:Inside La:-Placement With Foster Carer, Through Agency
F4:Out Of County:-Foster Placement With A Relative Or Friend
F5:Out Of County:-Placement With Other Foster Carer Through La
F6:Out Of County:Placement With Foster Carer,through Agency
H1:Secure Unit Inside La Boundary
H2:Secure Unit Outside La Boundary
H3:Children Homes Regs:- Homes & Hostels Inside La Boundary
H4:Children Homes Regs:- Homes & Hostels Outside La Boundary
H5:Residential Accommodation Not Subject To Childrens Homes Reg
M1:Missing From Placement:- In Refuge
M2:Missing From Placement:-Whereabouts Known
M3:Missing From Placement:- Whereabouts Unknown
P1:Placed With Own Parents Or Person With Parental Responsibility
P2:Independent living , e.g. in flat, lodgings,bedsit, B&B or with friends, with or without formal support
P3:Residential Employment
R1:Other Res Setting:- Residential Care Home
R2:Other Res Setting:-NHS/health Trust Estab Medical Or Nursing
R3:Other Res Setting:- Famliy Centre Or Mother And Baby Unit
R4:Other Res Setting:- Youth Treatment Centre
R5:Other Res Setting:- Young Offender Institution Or Prison
S1:Schools:-All Residential Schools, Except Where Dual Reg
T0:Temporary placement - all types
T1:Temporary placement - hospital
T2:Temporary placement - child on holiday

The Start Date and possibly at a later date the End Date will be required:



You will need to state whether the child is eligible or relevant in light of the Children (Leaving Care) Act 2000:

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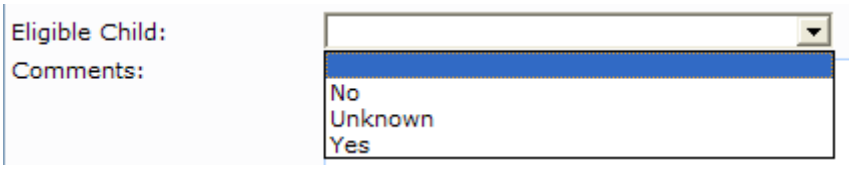


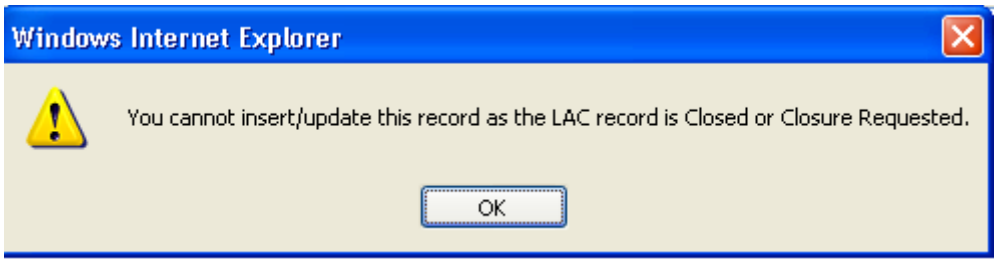
Note: The definitions of eligible or relevant are as follows:

An **'eligible child'** according to the definition in the Children (Leaving Care) Act, i.e. still in care, and looked after for at least 13 weeks since the age of 14.

A **'relevant child'** according to the definition in the Children (Leaving Care)Act, i.e. have left care but were looked after for at least 13 weeks from the age of 14 and for some time while 16/17.

Any comments can be entered in the Comments box. Once completed clicking on Insert will insert the record whilst Update will allow you to update the record once it is clicked back into the top box.

Note: If you attempt to record a Looked After status when the accompanying referral is either at 'Closure Summary Completed', 'Closure Requested' or Closed you will get the following prompt:



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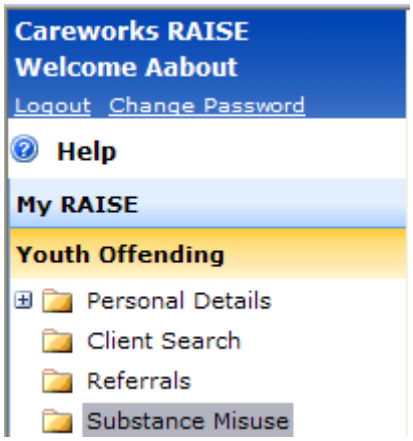
Chapter 18) Substance Misuse

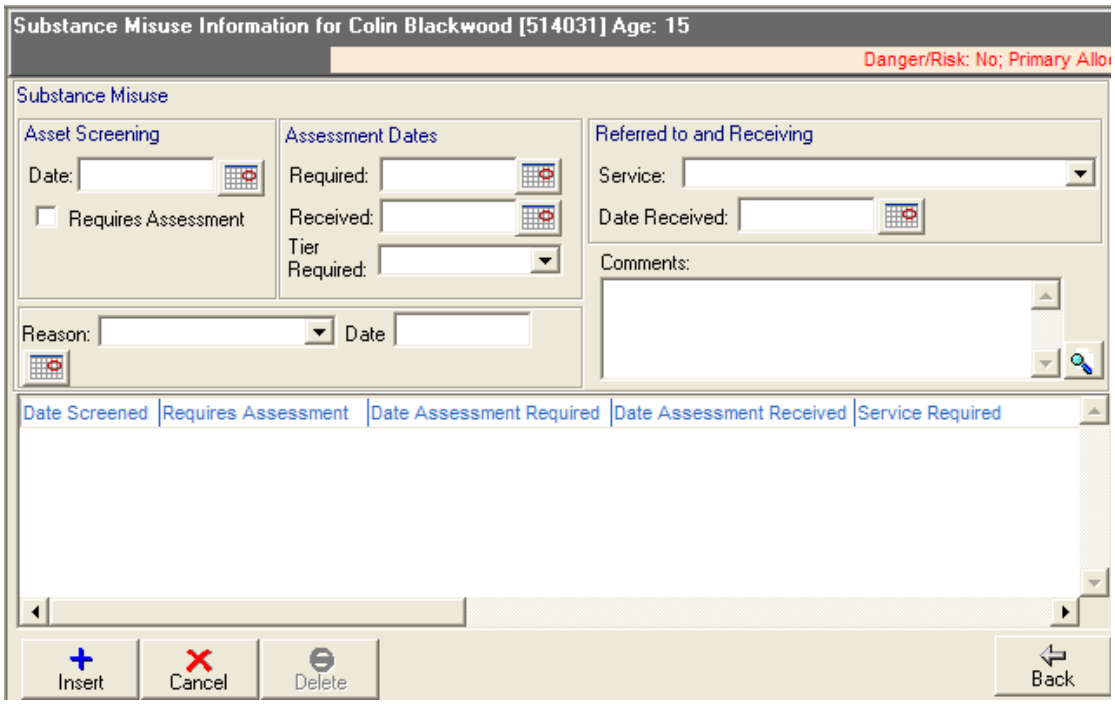
This module allows the input of information relating to Substance Misuse. It is used in the compilation of information for the Youth Justice Board and Department of Health Returns. The Asset Screening Date field and the Requires Assessment fields will normally be filled in by the practitioner, while the remaining information will generally be provided by the specialist drugs worker or service within the team.

To access Substance Misuse you click on the appropriate icon on the left hand side of the screen:



Substance Misuse Information may be inserted and updated as required.

A single click will open this screen:



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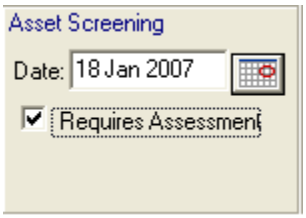
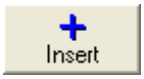
Following an assessment you may have concerns about the young person and believe they require a further assessment. You would then fill in the Assessment Date and tick the box:



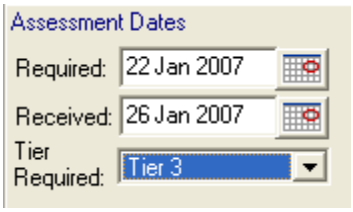
You then click 

which creates an entry in the box below:

Date Screened	Requires Assessment	Date Assessment Required	Date Assessment Received	Service Required
18 Jan 2007	True			

You make a referral to the substance misuse worker (secondary allocation of the referral is one method). Your colleague upon examination of the assessment either agrees or disagrees that the young person requires an assessment. If they agree they double click the initial record back into the top box and fill in the required date:

When they have carried out their assessment they would enter the date of that assessment in the Received box and indicate what service they require:



They can update the record at that point if so required:

Date Screened	Requires Assessment	Date Assessment Required	Date Assessment Received	Service Required
18 Jan 2007	True	22 Jan 2007	26 Jan 2007	Tier 3

To amend any details on an existing record or to add further information to an existing record, highlight the relevant record with a single mouse click, add the requisite information and, to save click on the

button. In this case when your colleague receives information about the service starting and the Service the young person is getting they would update this record:

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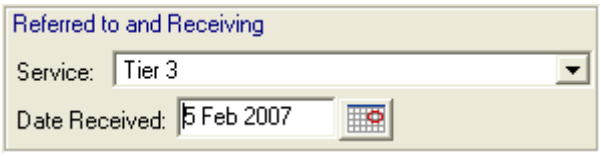
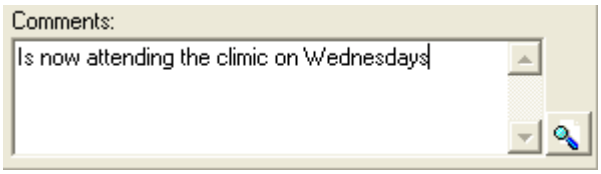
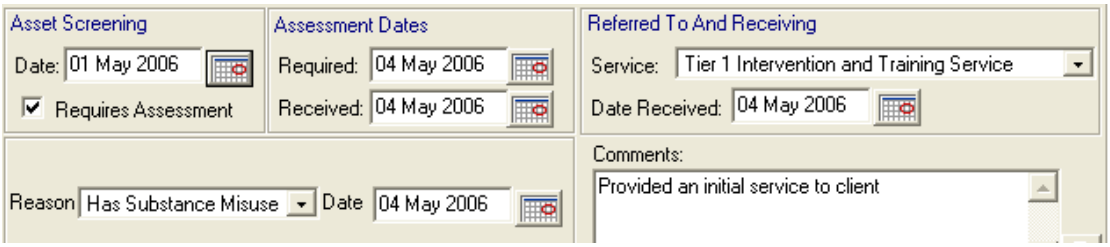


Any comments can be added:



The reason box is for Children's Services Returns but could be utilised by the YOT for recording a young person refusing a service:



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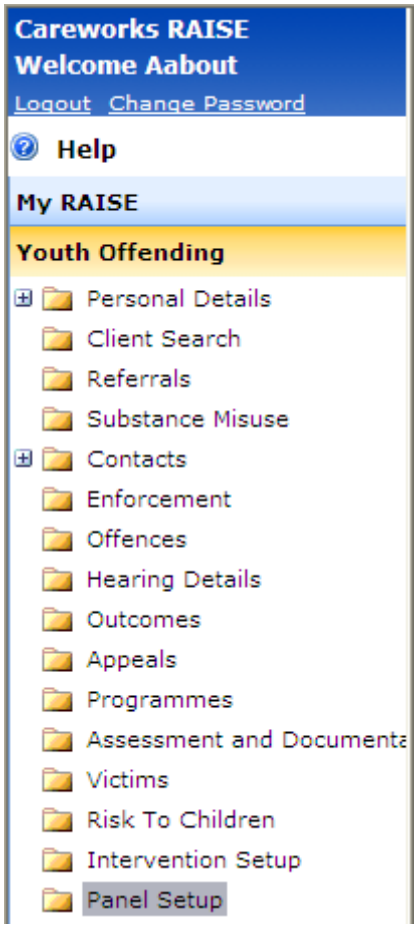
Chapter 19) Panel Setup

The Panel Setup module allows practitioners and administrators to create and maintain lists of Panel Venues, Panel Members, Members' Availability Information and create actual Panel Meetings themselves. Venues and Members will be set up initially and then maintained by the Referral Order Co-ordinators. Member availability and setting up the actual panels will be the daily business.

You access the Panel Set up via the menu on the left hand-side:



You are then presented with a screen with four separate tabs:

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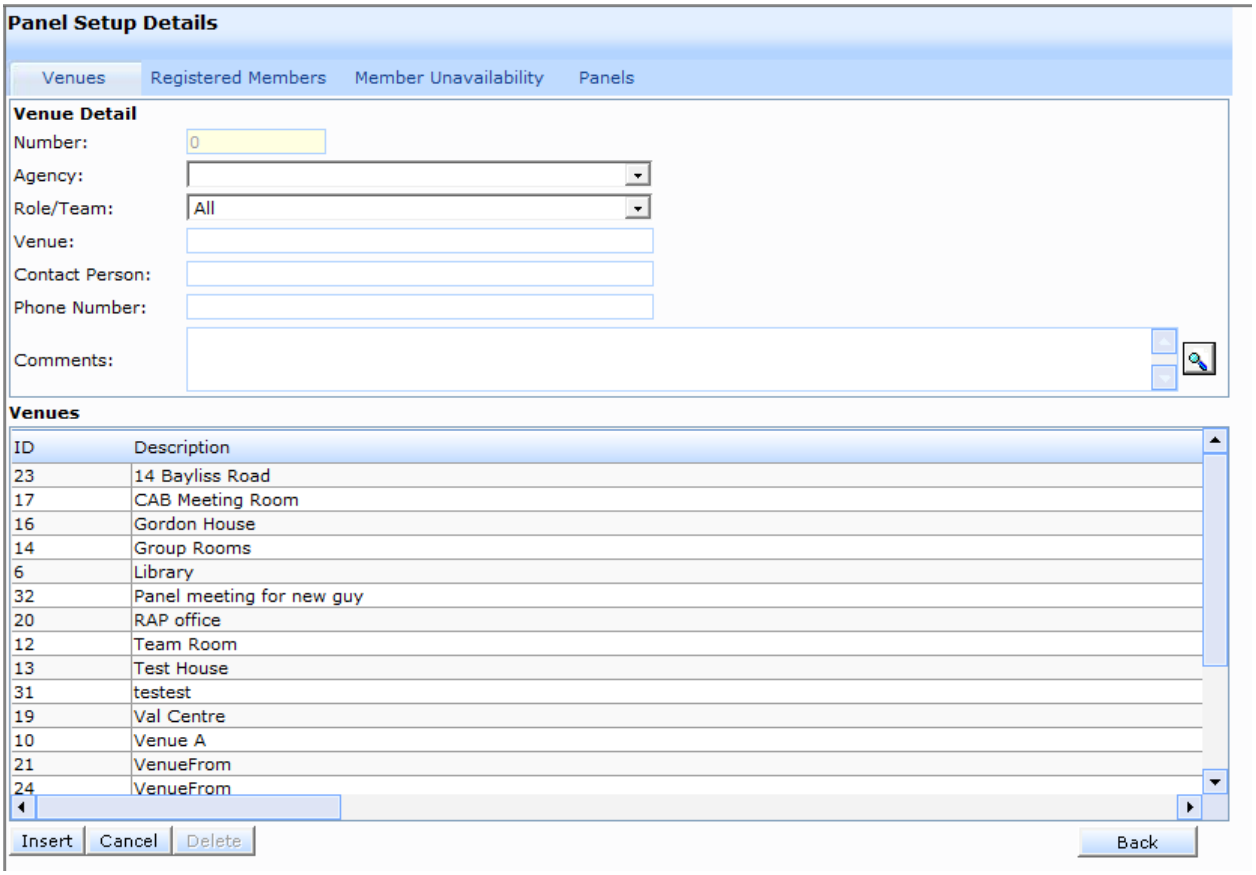

The first tab, Venues, allows you to set up, amend and delete venue details for the panels and presents a list of current venues:

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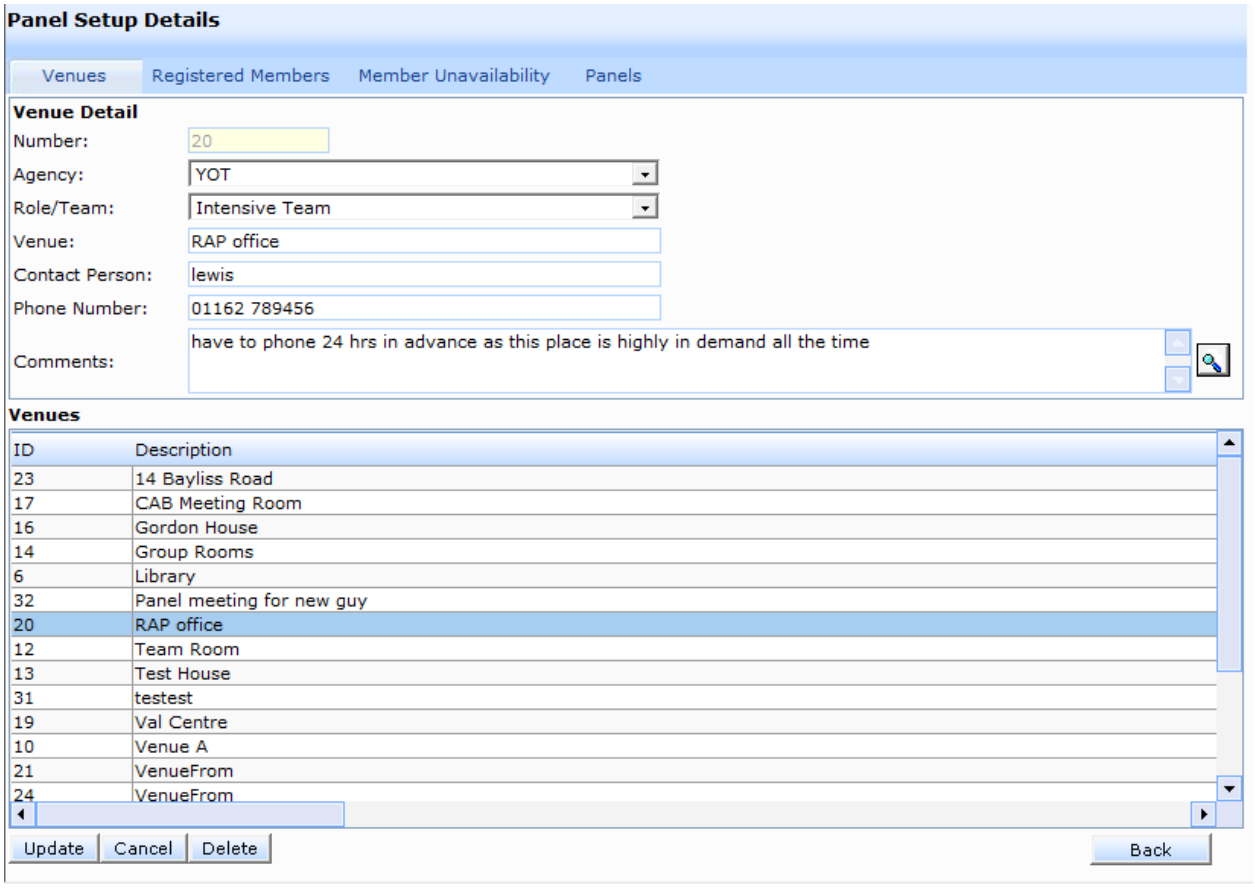
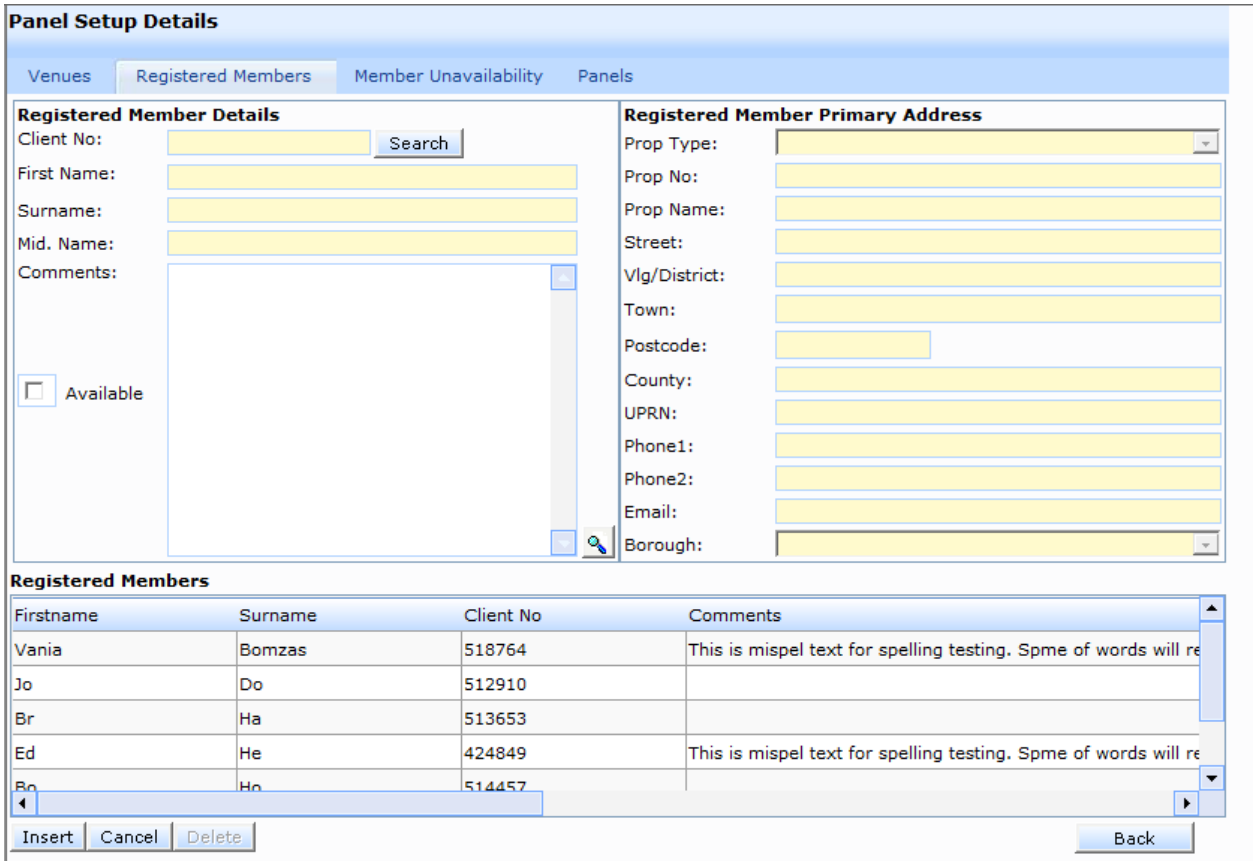
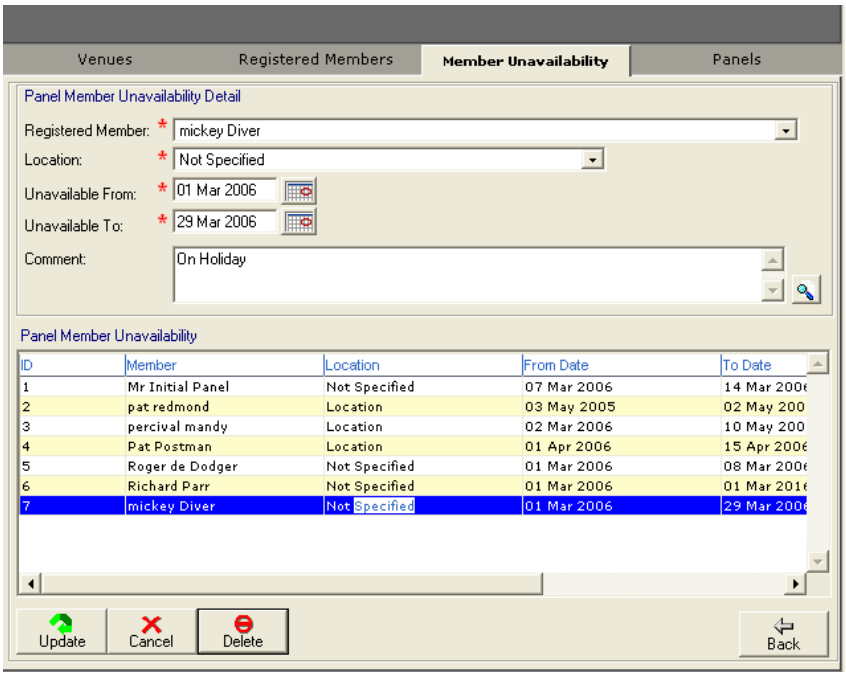

Panel Setup Details
Venues
Registered Members
Member Unavailability
Panels
Venue Detail
Number:
20
Agency:
YOT
Role/Team:
Intensive Team
Venue:
RAP office
Contact Person:
lewis
Phone Number:
01162 789456
Comments:
have to phone 24 hrs in advance as this place is highly in demand all the time
Venues
ID
Description
23
14 Bayliss Road
17
CAB Meeting Room
16
Gordon House
14
Group Rooms
6
Library
32
Panel meeting for new guy
20
RAP office
12
Team Room
13
Test House
31
testest
19
Val Centre
10
Venue A
21
VenueFrom
24
VenueFrom
Update
Cancel
Delete
Back


Panel Setup Details
Venues
Registered Members
Member Unavailability
Panels
Registered Member Details
Client No:
Search
First Name:
Surname:
Mid. Name:
Comments:
Available
Registered Member Primary Address
Prop Type:
Prop No:
Prop Name:
Street:
Vlg/District:
Town:
Postcode:
County:
UPRN:
Phone1:
Phone2:
Email:
Borough:
Registered Members
Firstname
Surname
Client No
Comments
Vania
Bomzas
518764
This is mispel text for spelling testing. Spme of words will re
Jo
Do
512910
Br
Ha
513653
Ed
He
424849
This is mispel text for spelling testing. Spme of words will re
Insert
Cancel
Delete
Back

The third tab, Member Unavailability, allows you to register member's unavailability details and presents a list of current available members with their unavailability logged:


Venues
Registered Members
Member Unavailability
Panels
Panel Member Unavailability Detail
Registered Member: * mickey Diver
Location: * Not Specified
Unavailable From: * 01 Mar 2006
Unavailable To: * 29 Mar 2006
Comment: On Holiday
Panel Member Unavailability
ID Member Location From Date To Date
1 Mr Initial Panel Not Specified 07 Mar 2006 14 Mar 200
2 pat redmond Location 03 May 2005 02 May 200
3 percival mandy Location 02 Mar 2006 10 May 200
4 Pat Postman Location 01 Apr 2006 15 Apr 200
5 Roger de Dodger Not Specified 01 Mar 2006 08 Mar 200
6 Richard Parr Not Specified 01 Mar 2006 01 Mar 201
7 mickey Diver Not Specified 01 Mar 2006 29 Mar 200
Update
Cancel
Delete
Back

The fourth tab, Panels, is where you create the individual panel meetings by selecting venues and members and associating them with a Panel Date.

Initially a venue is picked from the dropdown list, a panel date and time selected and a maximum number of attendees established.

Note: The number of attendees relates to how many young people the panel will deal with during the duration of the meeting. It could, for example, be used for an Initial Panel Meeting with one young person but it might also deal with a Review and Final Panel for two other young people. In this example the number of attendees would be three and any attempt to add further attendees will be stopped by CareDirector Youth.

The panel is then in the bottom box and a single click will bring it back to the top box and the members can then be selected:

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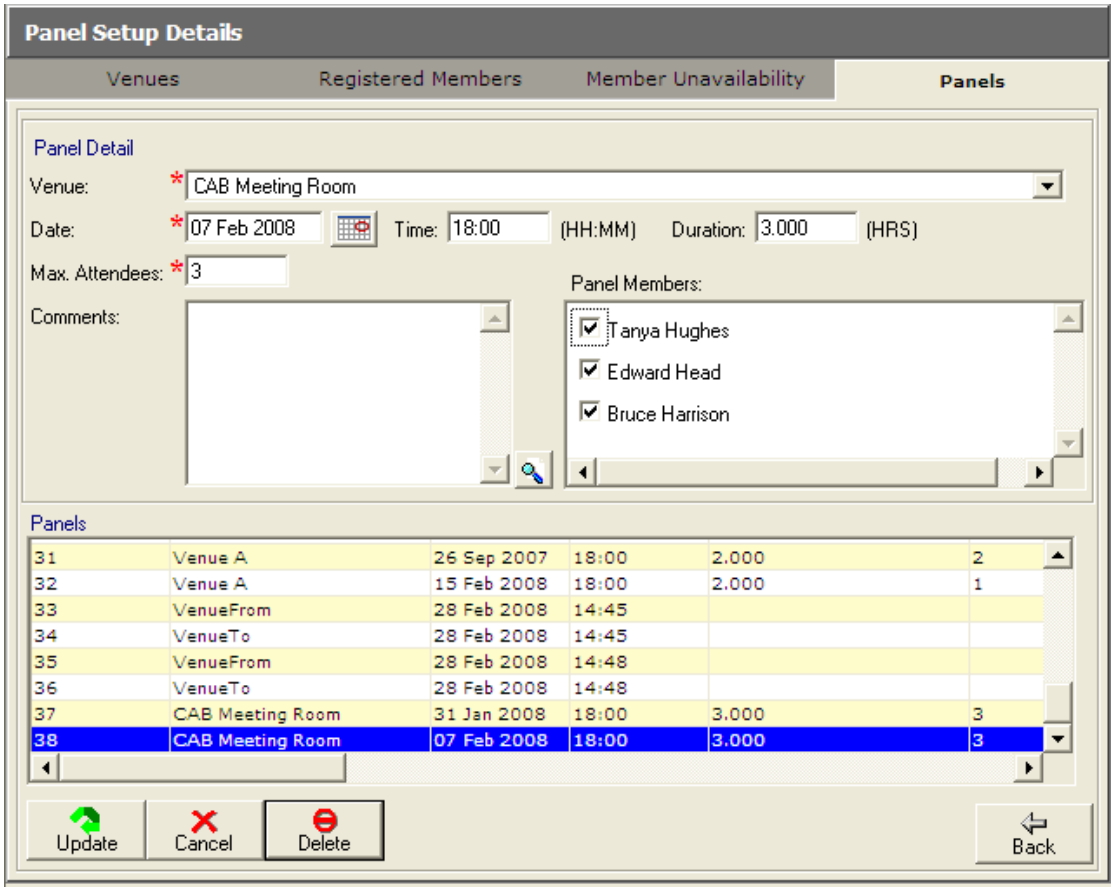
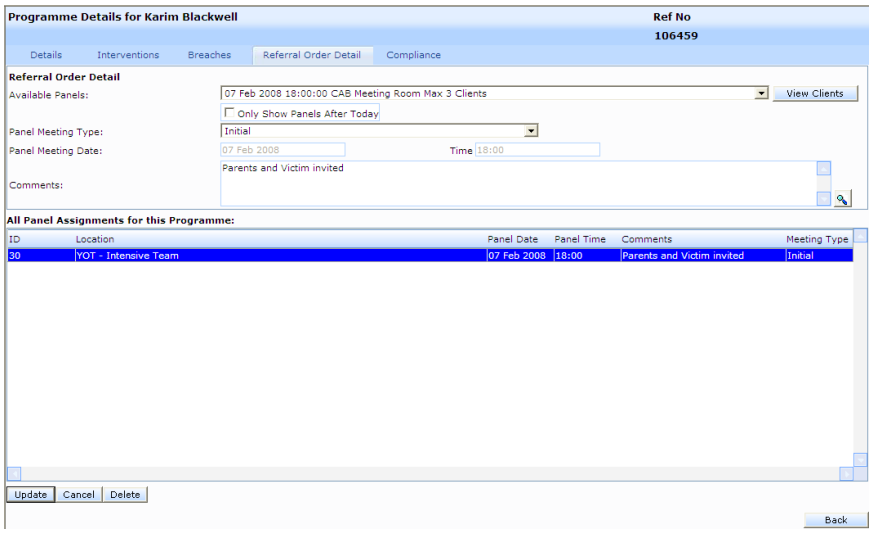


If you click on the

button this will then complete the setting up of the panel.

Note: For the Panel to be completed it needs to be associated with the young person via the Referral Order Details tab within the Programme:



Once this done then the practitioner can associate their Panel Report to the correct Panel:

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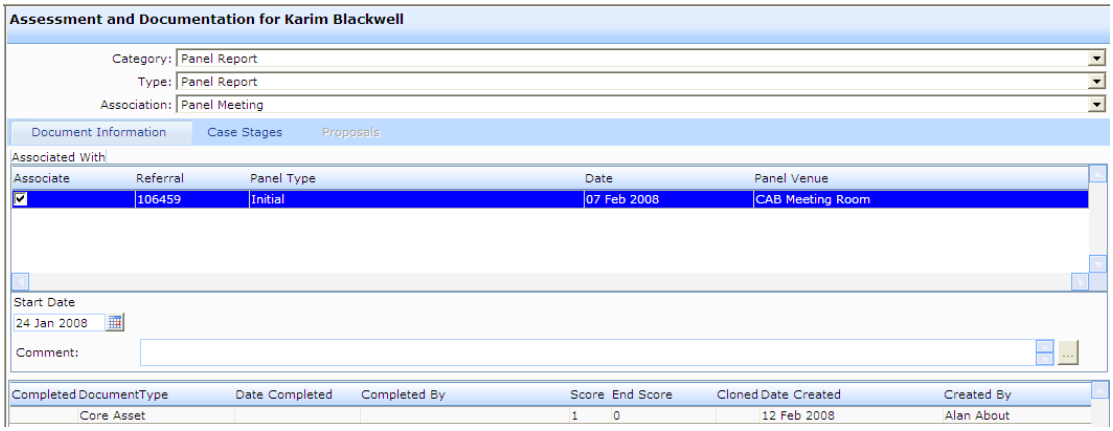

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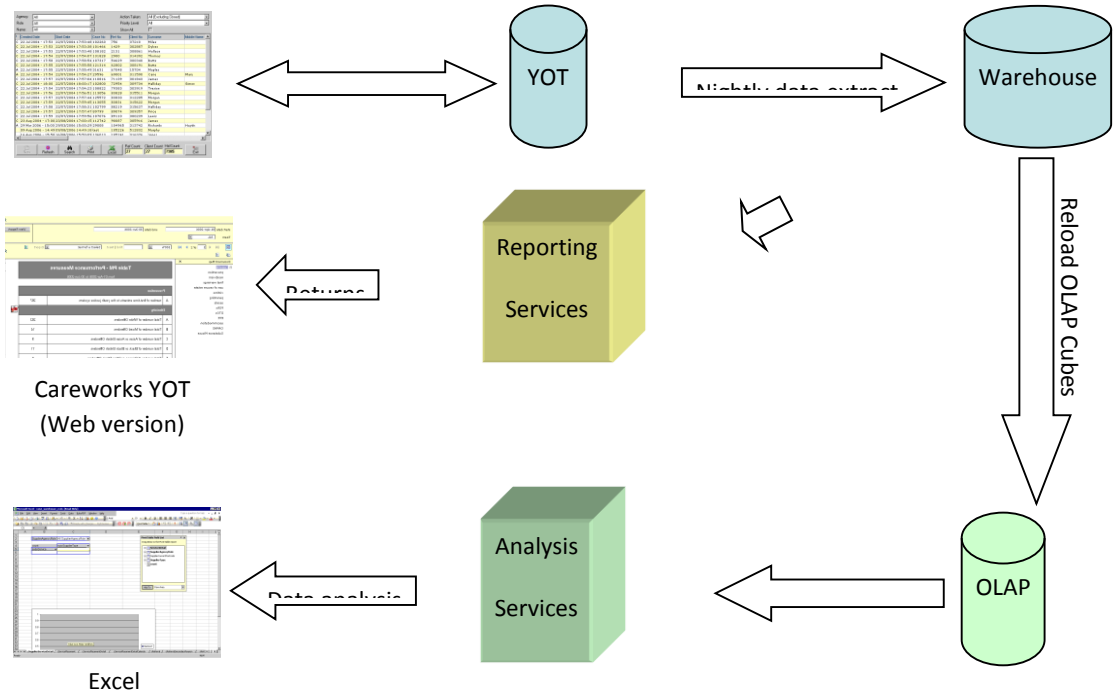
Chapter 20) Reporting

Essentially there are three direct methods of obtaining information from the application. The first is within the application itself and this has the advantage of the information being contemporary as it utilises the application's operational database.

The next two are reliant on the data warehouse which effectively downloads and sorts information from the application database on a daily basis as illustrated below:



The first of these is a combination of client and ad hoc reports and the YJB statutory Quarterly and Annual Returns. The second approach is via the OLAP (On line Analytical Processing) cubes which allow the user to construct reports by interrogating data via an Excel spreadsheet.

There is a fourth approach and this is where users construct their own reports via Microsoft Reporting Services. CareWorks, whilst not providing training on Microsoft Reporting Services, does offer training related to familiarising the user with the structure of the **CareDirector Youth** database.

Within the Application

This session describes how to obtain basic Management Information directly from the operational database.

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Using the Search Facility

Within the following modules the user is presented with the ability via the search button

to conduct basic searches:

- Personal Details
- Referrals
- Offences
- Hearing Details
- Outcomes
- Programmes
- Enforcement
- Victims

In addition both the Referrals and Contacts module has a specific search facility which allows the user to interrogate by constructing different search parameters:

Note: Within Contacts this will be limited to the person displayed in the banner.

Activity: Search for all Priority 1 referrals related to a particular team.

Activity: Search for all contacts between certain dates that have meeting type of Supervision Session (Stat Order) relaying to a particular young person.

Referrals

Within Referrals the user is presented with the following Search screen:

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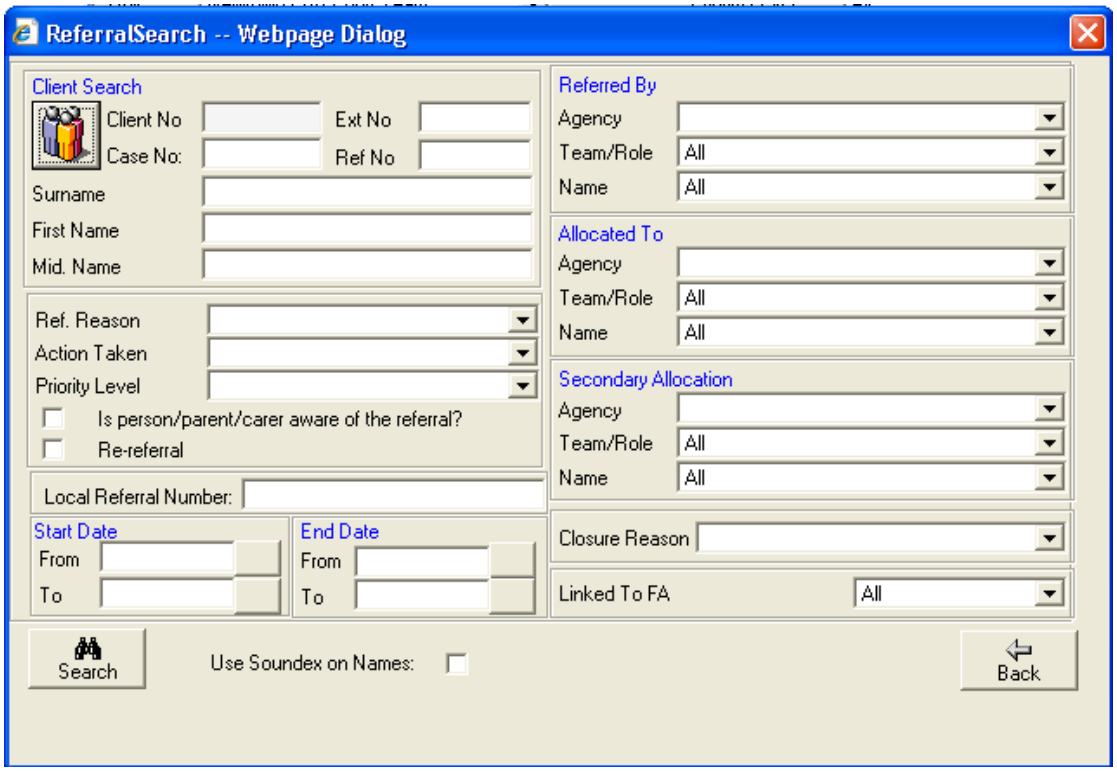

Examples of the searches that can be conducted are as follows:

- Search for referrals related to a particular person.
- Search for Referral Reasons such as *Request for Appropriate Adult Service.*
- Search action taken to determine the number of referrals *Pending Allocation.*
- Search for referrals between set dates.
- Search for referrals originating from a particular agency, team or person.
- Search for all referrals allocated to a particular worker either as a primary or secondary worker.
- Search for referrals with a particular Closure Reason.

Obviously these searches can be for a single or multiple values within the search screen.

How the application can be utilised is illustrated by the use of *Local Referral Number* by a particular YOT. This field allows both alpha and numeric values to be entered. They wanted to distinguish which referrals were allocated to which geographical offices and asked the administrative staff to enter into the *Local Referral Number field* the name of the office dealing with the referral. As result they are now able to ascertain how many referrals are coming into which offices.

Offences

Within Offences the user is presented with the following search screen:

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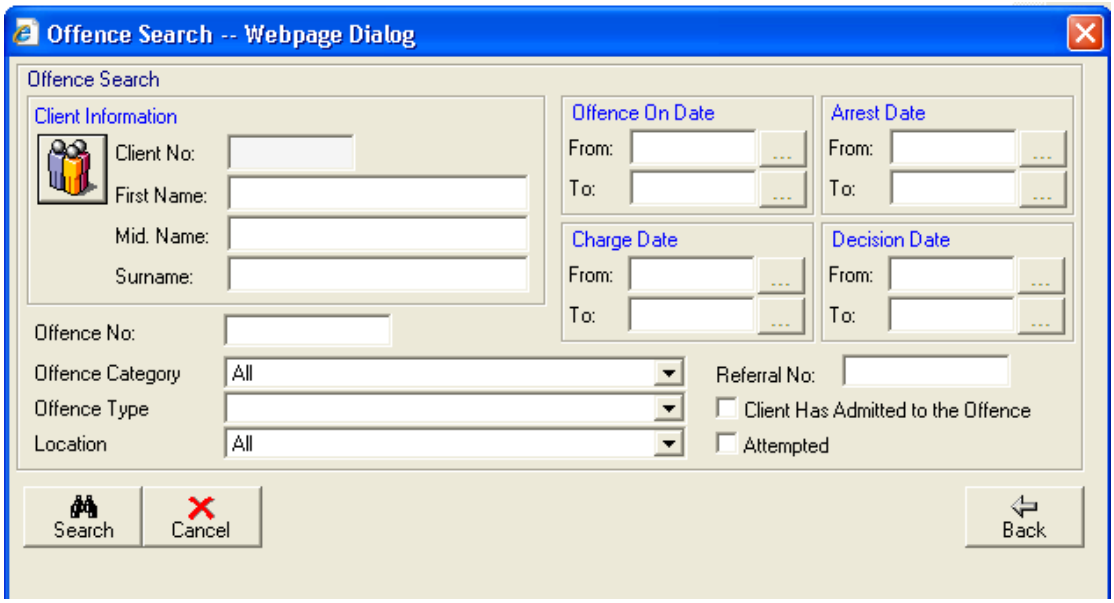

Examples of the searches that can be conducted are as follows:

- Search for offences related to a particular person.
- Search for particular offences.
- Search for all offences between certain dates.
- Search for all arrests or charges between certain dates.

Each YOT can determine the *Location* of offences according to local needs. For example if the YOT had decided to enter a value of *Public Place* as one of a number of locations, such as *Commercial Premises* and *Private Dwelling*, then all offences committed in a public place could be returned.

Hearing Details

Within Offences the user is presented with the following Search screen:

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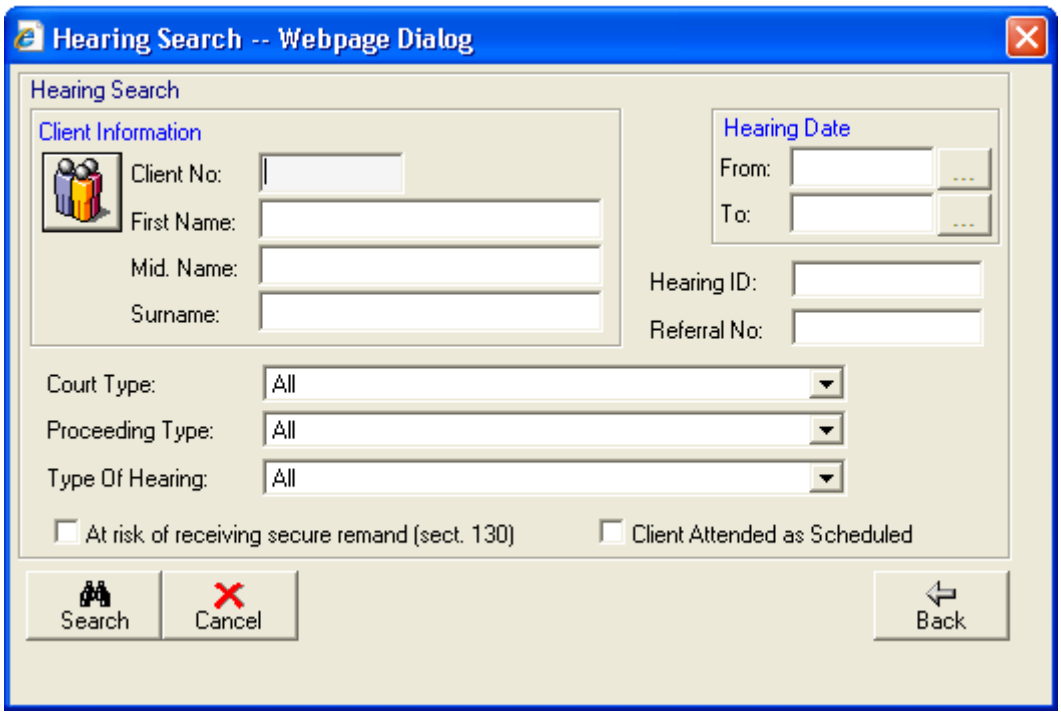


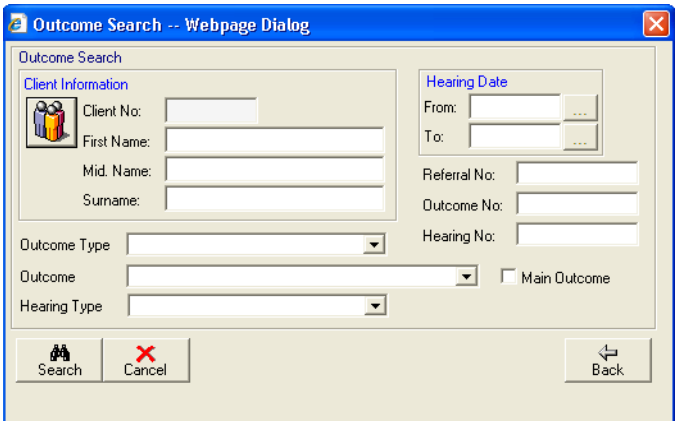
Examples of the searches that can be conducted are as follows:

- Search for Court Hearings related to a particular person.
- Search for all proceedings of a Civil as opposed to Criminal nature.
- Search for all hearings of a certain type such as Sentence.
- Search for all hearings between certain dates.
- Search for all hearings where there was a risk of a Secure Remand.

Using the referral number allows you to return all the hearings related to a particular referral.

Outcomes

Within Outcomes the user is presented with the following screen:



Examples of the searches that can be conducted are as follows:

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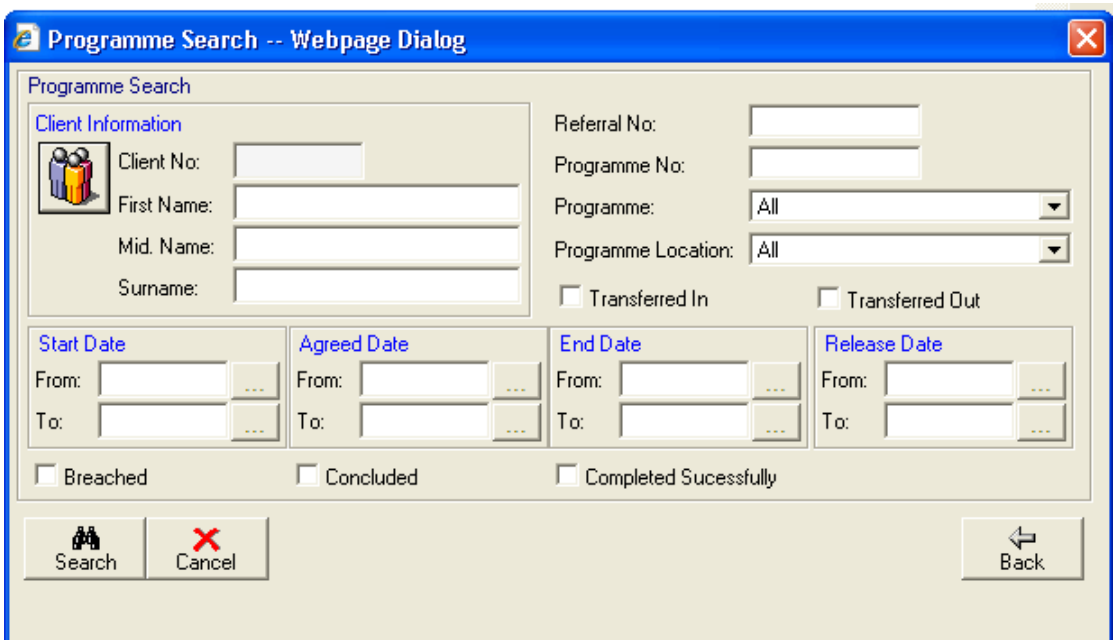
- Search for outcomes related to a particular person.
- Search for all Pre Court Outcomes.
- Search for all outcomes between certain dates.
- Search for all main outcomes in relation to a particular young person.

Programmes

Within Programmes the user is presented with the following screen:



Examples of the searches that can be conducted are as follows:

- Search for Programmes related to a particular person.
- Search for particular programme dates between particular dates.
- Search for programmes starting and ending within set dates.
- Look for all programmes that have been breached within certain dates.

It is possible to identify any young person who is due to be released from custody between certain dates. However it will not display the Release Date but that can be obtained by viewing individual programmes and added as a column to a spreadsheet.

Enforcement

Within Enforcement the user is presented with the following screen:

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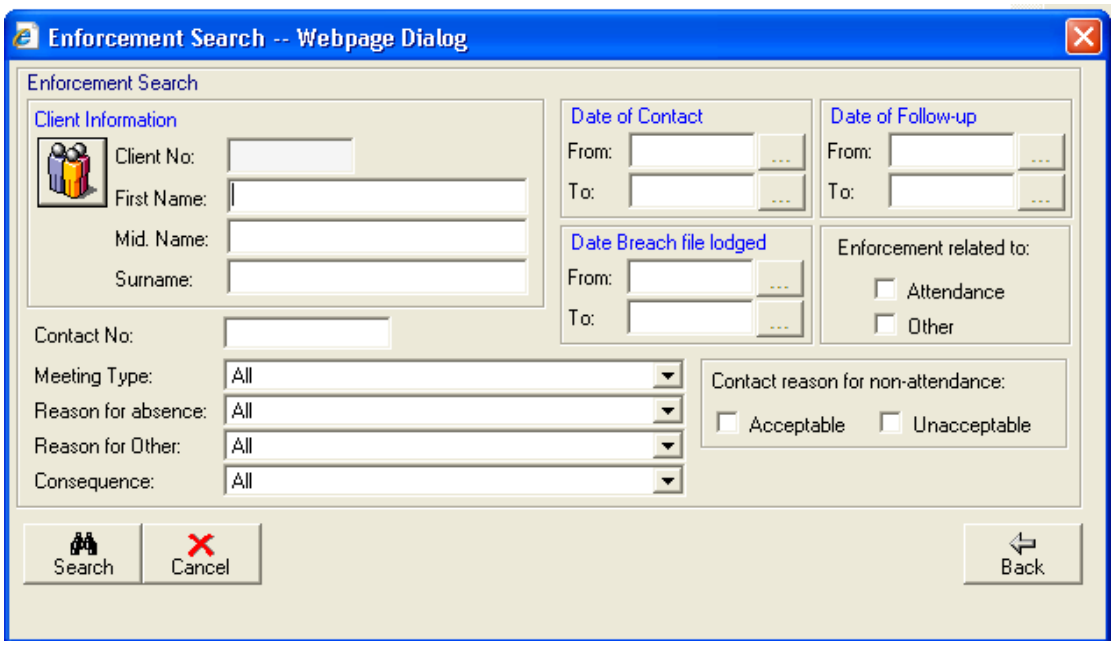


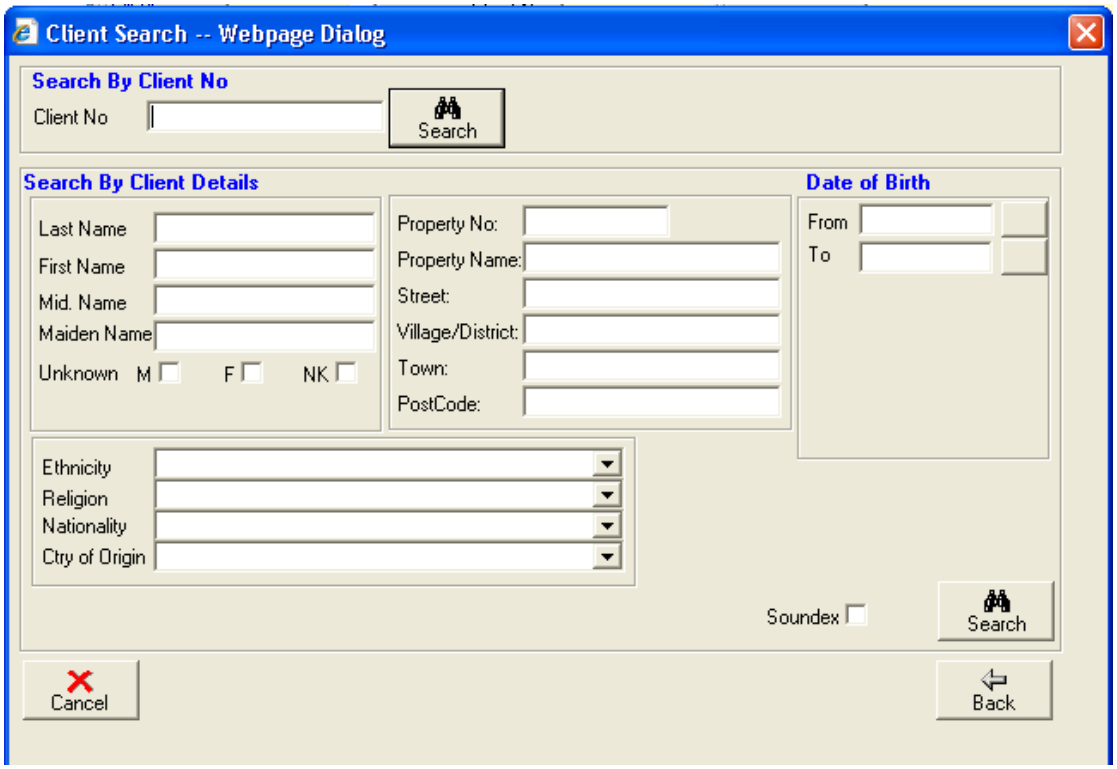
Examples of the searches that can be conducted are as follows:

- Search for Enforcements related to a particular person.
- Search for Enforcements related to Attendance or Other.
- Search for particular reasons for absences.
- Search for all contacts where the reason for absence was recorded as Unacceptable.

By entering a *Date of Contact* for a particular day and then clicking on search it is possible to 'eyeball' all contacts of non attendance and see the date of follow up in accordance with National Standards.

Victims

Within Victims the user is presented with the following screen:



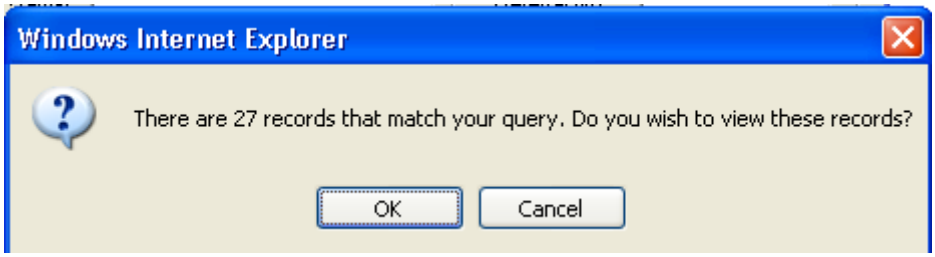
Examples of the searches that can be conducted are as follows:

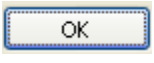
- Search for a particular victim.

Note: You are in effect in the Client Search facility so that the ability to search for particular victim aspects is limited.

Results of Searches

In most of the searches you will be informed of the result:



Clicking on 

will reveal the result of this search. In our example we have asked to see all Court Outcomes relating to Referral Orders between certain dates:

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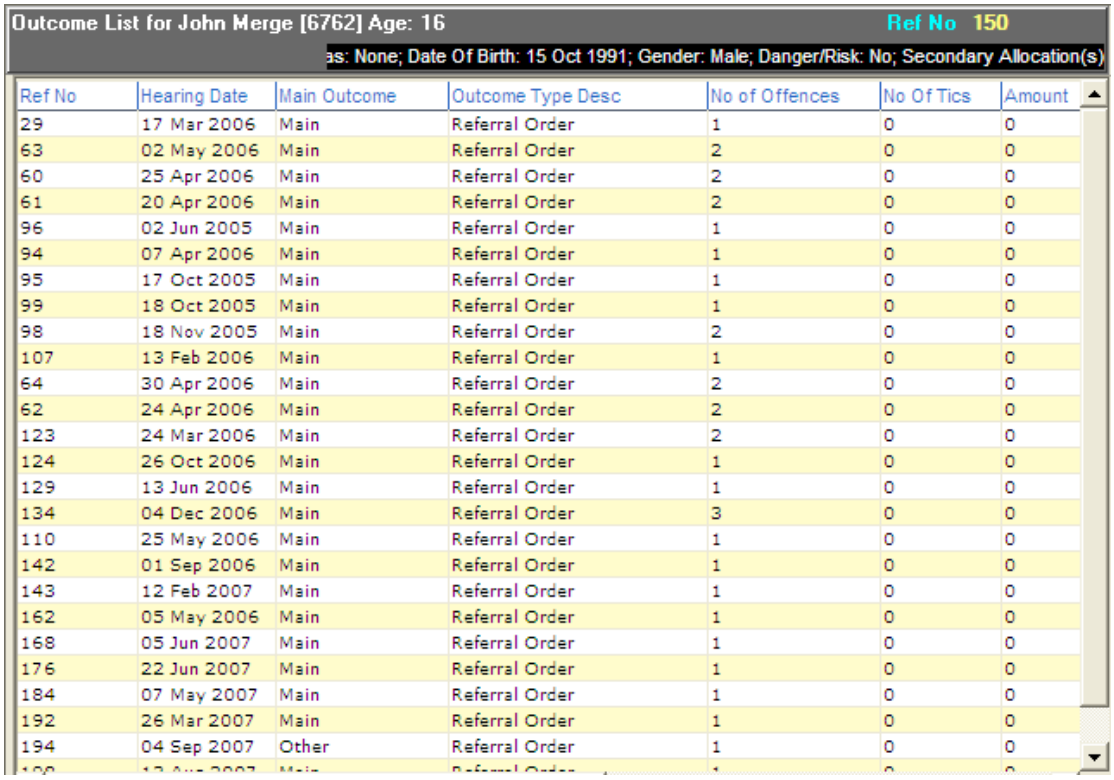


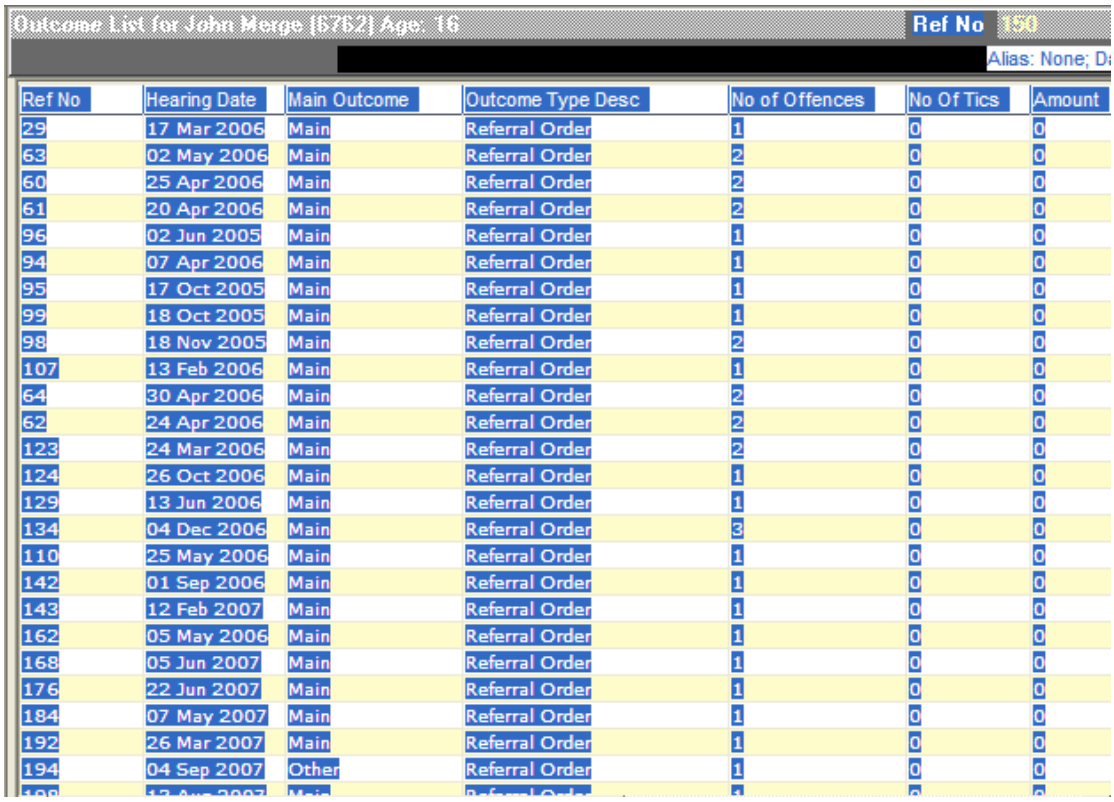
Outcome List for John Merge [6762] Age: 16 Ref No 150

as: None; Date Of Birth: 15 Oct 1991; Gender: Male; Danger/Risk: No; Secondary Allocation(s)

Ref No	Hearing Date	Main Outcome	Outcome Type Desc	No of Offences	No Of Tics	Amount
29	17 Mar 2006	Main	Referral Order	1	0	0
63	02 May 2006	Main	Referral Order	2	0	0
60	25 Apr 2006	Main	Referral Order	2	0	0
61	20 Apr 2006	Main	Referral Order	2	0	0
96	02 Jun 2005	Main	Referral Order	1	0	0
94	07 Apr 2006	Main	Referral Order	1	0	0
95	17 Oct 2005	Main	Referral Order	1	0	0
99	18 Oct 2005	Main	Referral Order	1	0	0
98	18 Nov 2005	Main	Referral Order	2	0	0
107	13 Feb 2006	Main	Referral Order	1	0	0
64	30 Apr 2006	Main	Referral Order	2	0	0
62	24 Apr 2006	Main	Referral Order	2	0	0
123	24 Mar 2006	Main	Referral Order	2	0	0
124	26 Oct 2006	Main	Referral Order	1	0	0
129	13 Jun 2006	Main	Referral Order	1	0	0
134	04 Dec 2006	Main	Referral Order	3	0	0
110	25 May 2006	Main	Referral Order	1	0	0
142	01 Sep 2006	Main	Referral Order	1	0	0
143	12 Feb 2007	Main	Referral Order	1	0	0
162	05 May 2006	Main	Referral Order	1	0	0
168	05 Jun 2007	Main	Referral Order	1	0	0
176	22 Jun 2007	Main	Referral Order	1	0	0
184	07 May 2007	Main	Referral Order	1	0	0
192	26 Mar 2007	Main	Referral Order	1	0	0
194	04 Sep 2007	Other	Referral Order	1	0	0

Note: Whilst the banner will display a specific client the results will relate to your query.

In our example here we know there are 27 records but at this stage we are not aware of the names of the young people that make up this sample. In order to identify these young people you need to export the data to Excel. This is achieved by initially highlighting the results of your search by holding down the ***Ctrl , Caps Lock and A*** keys:



Outcome List for John Merge [6762] Age: 16 Ref No 150

Alias: None; D

Ref No	Hearing Date	Main Outcome	Outcome Type Desc	No of Offences	No Of Tics	Amount
29	17 Mar 2006	Main	Referral Order	1	0	0
63	02 May 2006	Main	Referral Order	2	0	0
60	25 Apr 2006	Main	Referral Order	2	0	0
61	20 Apr 2006	Main	Referral Order	2	0	0
96	02 Jun 2005	Main	Referral Order	1	0	0
94	07 Apr 2006	Main	Referral Order	1	0	0
95	17 Oct 2005	Main	Referral Order	1	0	0
99	18 Oct 2005	Main	Referral Order	1	0	0
98	18 Nov 2005	Main	Referral Order	2	0	0
107	13 Feb 2006	Main	Referral Order	1	0	0
64	30 Apr 2006	Main	Referral Order	2	0	0
62	24 Apr 2006	Main	Referral Order	2	0	0
123	24 Mar 2006	Main	Referral Order	2	0	0
124	26 Oct 2006	Main	Referral Order	1	0	0
129	13 Jun 2006	Main	Referral Order	1	0	0
134	04 Dec 2006	Main	Referral Order	3	0	0
110	25 May 2006	Main	Referral Order	1	0	0
142	01 Sep 2006	Main	Referral Order	1	0	0
143	12 Feb 2007	Main	Referral Order	1	0	0
162	05 May 2006	Main	Referral Order	1	0	0
168	05 Jun 2007	Main	Referral Order	1	0	0
176	22 Jun 2007	Main	Referral Order	1	0	0
184	07 May 2007	Main	Referral Order	1	0	0
192	26 Mar 2007	Main	Referral Order	1	0	0
194	04 Sep 2007	Other	Referral Order	1	0	0

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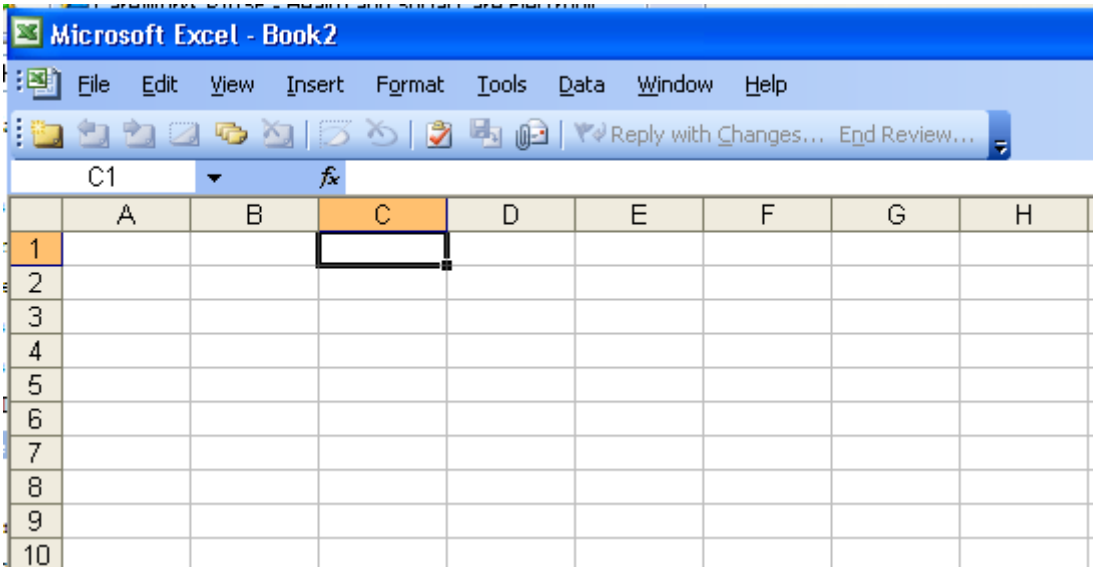
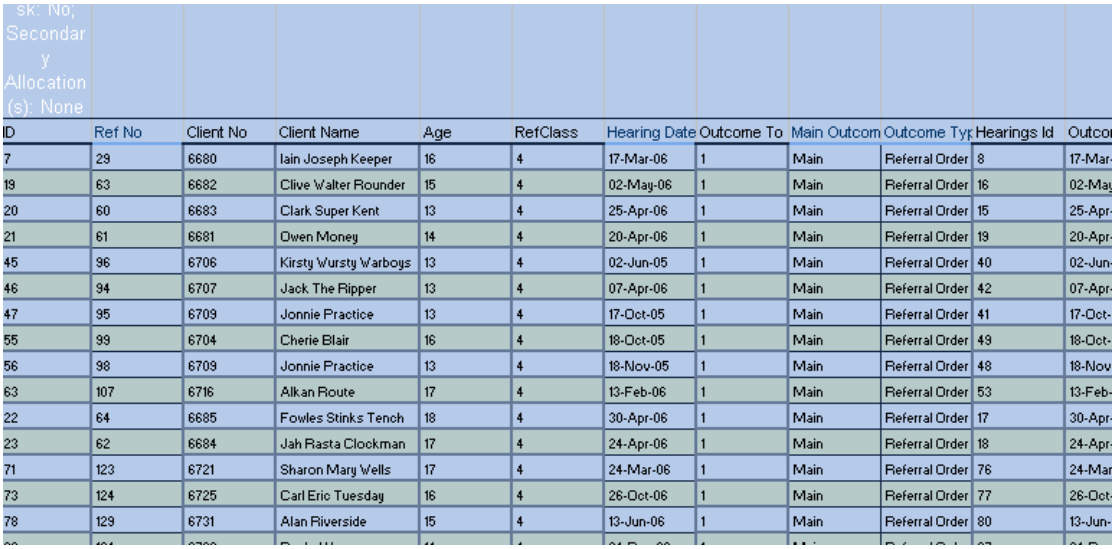
You then click on *Ctrl and C* keys which copies that sample and opens up a blank Excel spreadsheet:


Microsoft Excel - Book2
File Edit View Insert Format Tools Data Window Help
Reply with Changes... End Review...
C1
A B C D E F G H
1 2 3 4 5 6 7 8 9 10

Once you have chosen your cell paste your selection into the spreadsheet:



sk: No; Secondary Allocation (s): None

ID	Ref No	Client No	Client Name	Age	RefClass	Hearing Date	Outcome To	Main Outcom	Outcome Typ	Hearings Id	Outcor
7	29	6680	Iain Joseph Keeper	16	4	17-Mar-06	1	Main	Referral Order	8	17-Mar-
19	63	6682	Clive Walter Rounder	15	4	02-May-06	1	Main	Referral Order	16	02-May
20	60	6683	Clark Super Kent	13	4	25-Apr-06	1	Main	Referral Order	15	25-Apr-
21	61	6681	Owen Money	14	4	20-Apr-06	1	Main	Referral Order	19	20-Apr-
45	96	6706	Kirsty Wursty Warboys	13	4	02-Jun-05	1	Main	Referral Order	40	02-Jun-
46	94	6707	Jack The Ripper	13	4	07-Apr-06	1	Main	Referral Order	42	07-Apr-
47	95	6709	Jonnie Practice	13	4	17-Oct-05	1	Main	Referral Order	41	17-Oct-
55	99	6704	Cherie Blair	16	4	18-Oct-05	1	Main	Referral Order	49	18-Oct-
56	98	6709	Jonnie Practice	13	4	18-Nov-05	1	Main	Referral Order	48	18-Nov
63	107	6716	Alkan Route	17	4	13-Feb-06	1	Main	Referral Order	53	13-Feb-
22	64	6685	Fowles Stinks Tench	18	4	30-Apr-06	1	Main	Referral Order	17	30-Apr-
23	62	6684	Jah Rasta Clockman	17	4	24-Apr-06	1	Main	Referral Order	18	24-Apr-
71	123	6721	Sharon Mary Wells	17	4	24-Mar-06	1	Main	Referral Order	76	24-Mar
73	124	6725	Carl Eric Tuesday	16	4	26-Oct-06	1	Main	Referral Order	77	26-Oct-
78	129	6731	Alan Riverside	15	4	13-Jun-06	1	Main	Referral Order	80	13-Jun-

This will then display the person's name and the data can be manipulated within Excel.

Additional Information

There are two additional facilities which can assist you in looking for information.

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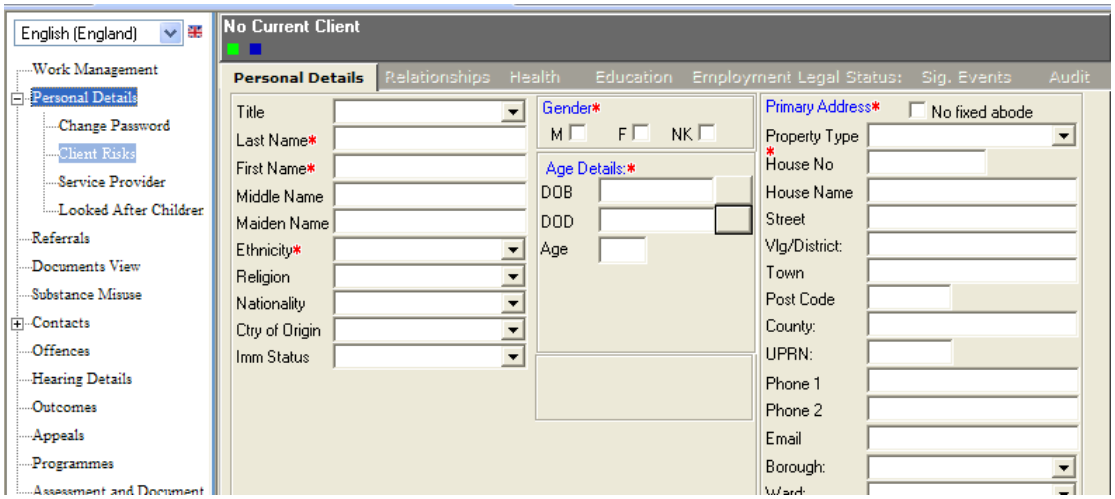
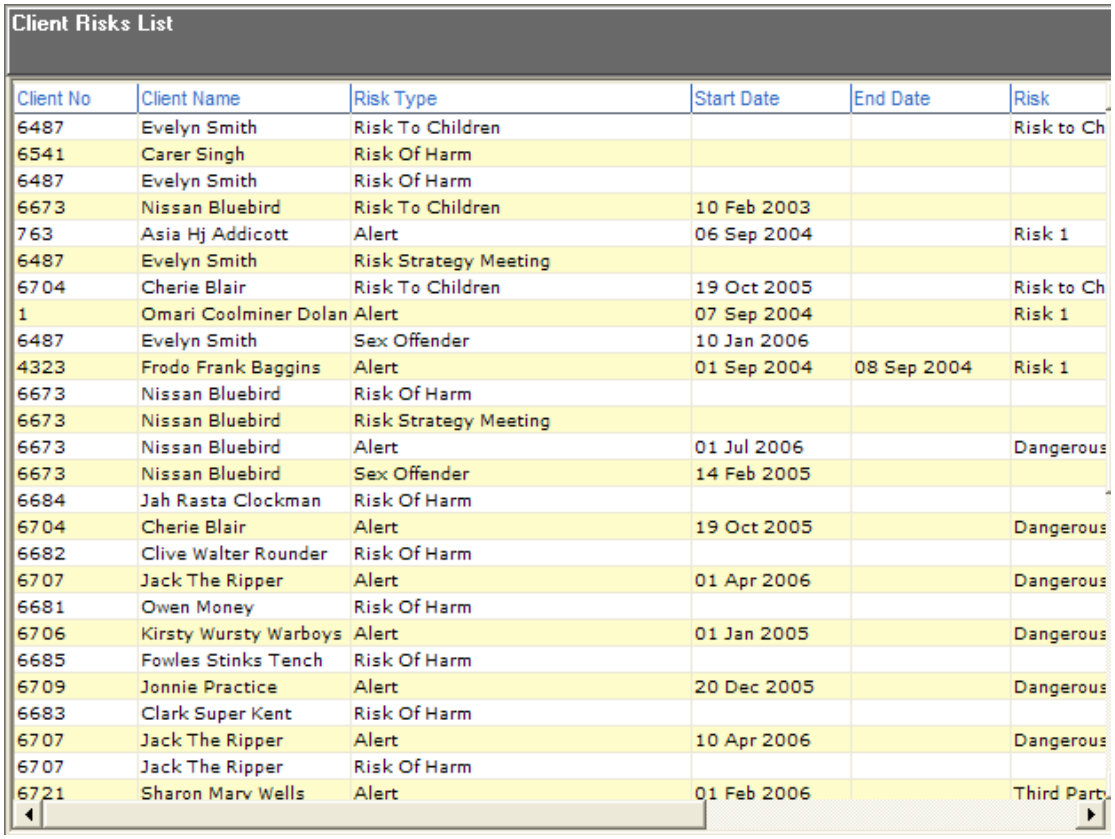


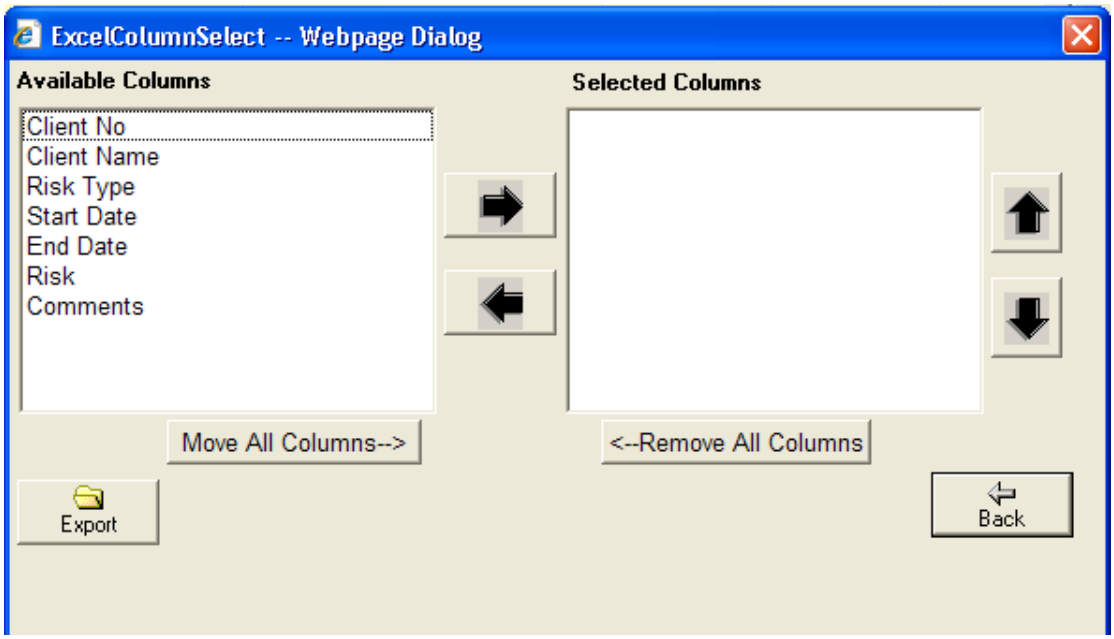
If you open up Personal Details without a client identified and consequently it is blank and then click on the Risks sub menu as shown it will display all recorded risks:



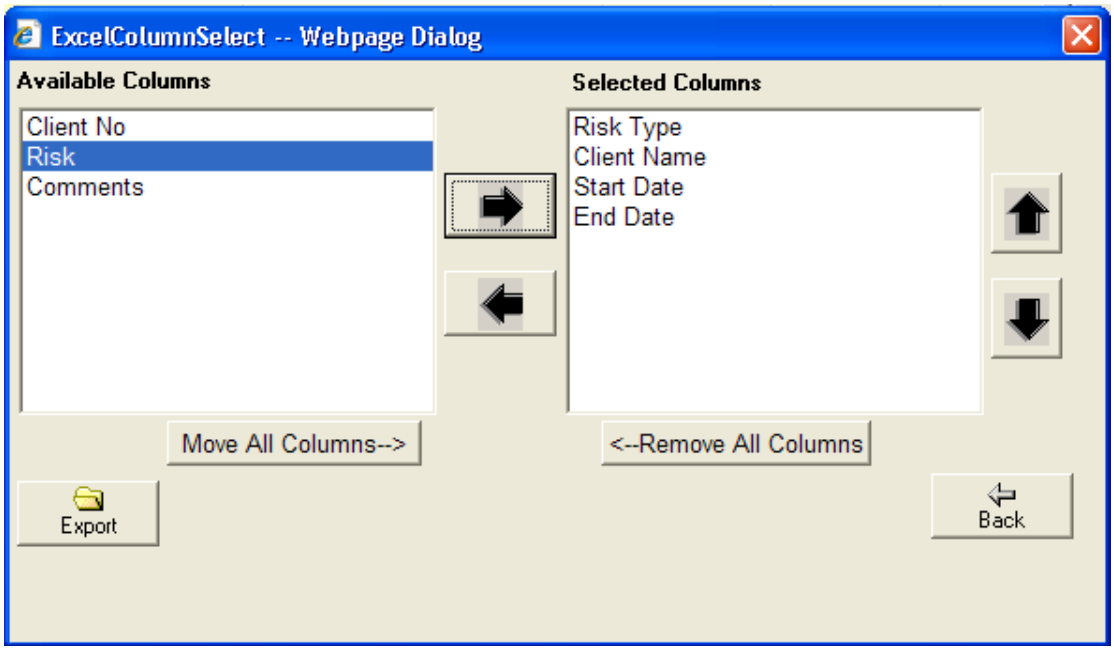
Client Risks List

Client No	Client Name	Risk Type	Start Date	End Date	Risk
6487	Evelyn Smith	Risk To Children			Risk to Ch
6541	Carer Singh	Risk Of Harm			
6487	Evelyn Smith	Risk Of Harm			
6673	Nissan Bluebird	Risk To Children	10 Feb 2003		
763	Asia Hj Addicott	Alert	06 Sep 2004		Risk 1
6487	Evelyn Smith	Risk Strategy Meeting			
6704	Cherie Blair	Risk To Children	19 Oct 2005		Risk to Ch
1	Omari Coolminer Dolan	Alert	07 Sep 2004		Risk 1
6487	Evelyn Smith	Sex Offender	10 Jan 2006		
4323	Frodo Frank Baggins	Alert	01 Sep 2004	08 Sep 2004	Risk 1
6673	Nissan Bluebird	Risk Of Harm			
6673	Nissan Bluebird	Risk Strategy Meeting			
6673	Nissan Bluebird	Alert	01 Jul 2006		Dangerous
6673	Nissan Bluebird	Sex Offender	14 Feb 2005		
6684	Jah Rasta Clockman	Risk Of Harm			
6704	Cherie Blair	Alert	19 Oct 2005		Dangerous
6682	Clive Walter Rounder	Risk Of Harm			
6707	Jack The Ripper	Alert	01 Apr 2006		Dangerous
6681	Owen Money	Risk Of Harm			
6706	Kirsty Wursty Warboys	Alert	01 Jan 2005		Dangerous
6685	Fowles Stinks Tench	Risk Of Harm			
6709	Jonnie Practice	Alert	20 Dec 2005		Dangerous
6683	Clark Super Kent	Risk Of Harm			
6707	Jack The Ripper	Alert	10 Apr 2006		Dangerous
6707	Jack The Ripper	Risk Of Harm			
6721	Sharon Mary Wells	Alert	01 Feb 2006		Third Party

These can be exported to Excel and you are given the ability to choose the columns you want displayed:



You then highlight the *Available Columns* you want displayed and move it across into the *Selected Columns*. The selected columns can be moved up and down dependent upon the order you want each field in Excel. In this example we have asked to see *Risk Type* followed by *Client Name* and *Start* and *End Dates*:

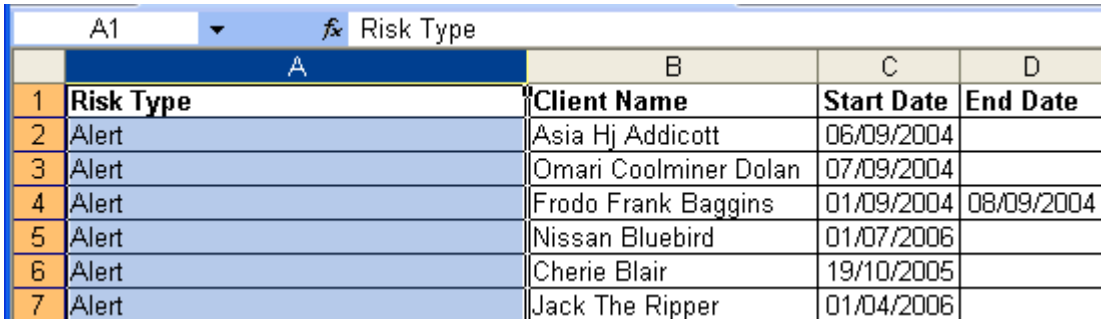


This query can then be exported

to Excel:

	A	B	C	D
1	**Risk Type**	**Client Name**	**Start Date**	**End Date**
2	Risk To Children	Evelyn Smith		
3	Risk Of Harm	Carer Singh		
4	Risk Of Harm	Evelyn Smith		
5	Risk To Children	Nissan Bluebird	10/02/2003	
6	Alert	Asia Hj Addicott	06/09/2004	
7	Risk Strategy Meeting	Evelyn Smith		
8	Risk To Children	Cherie Blair	19/10/2005	
9	Alert	Omari Coolminer Dolan	07/09/2004	
10	Sex Offender	Evelyn Smith	10/01/2006	
11	Alert	Frodo Frank Baggins	01/09/2004	08/09/2004
12	Risk Of Harm	Nissan Bluebird		
13	Risk Strategy Meeting	Nissan Bluebird		
14	Alert	Nissan Bluebird	01/07/2006	
15	Sex Offender	Nissan Bluebird	14/02/2005	
16	Risk Of Harm	Jah Rasta Clockman		
17	Alert	Cherie Blair	19/10/2005	
18	Risk Of Harm	Clive Walter Rounder		
19	Alert	Jack The Ripper	01/04/2006	
20	Risk Of Harm	Owen Money		
21	Alert	Kirsty Wursty Warboys	01/01/2005	
22	Risk Of Harm	Fowles Stinks Tench		
23	Alert	Jonnie Practice	20/12/2005	

Further manipulation, such as sorting, can then be achieved within Excel.



	A	B	C	D
1	**Risk Type**	**Client Name**	**Start Date**	**End Date**
2	Alert	Asia Hj Addicott	06/09/2004	
3	Alert	Omari Coolminer Dolan	07/09/2004	
4	Alert	Frodo Frank Baggins	01/09/2004	08/09/2004
5	Alert	Nissan Bluebird	01/07/2006	
6	Alert	Cherie Blair	19/10/2005	
7	Alert	Jack The Ripper	01/04/2006	

Schools

Within Administration there exists a facility to maintain details of your local schools:

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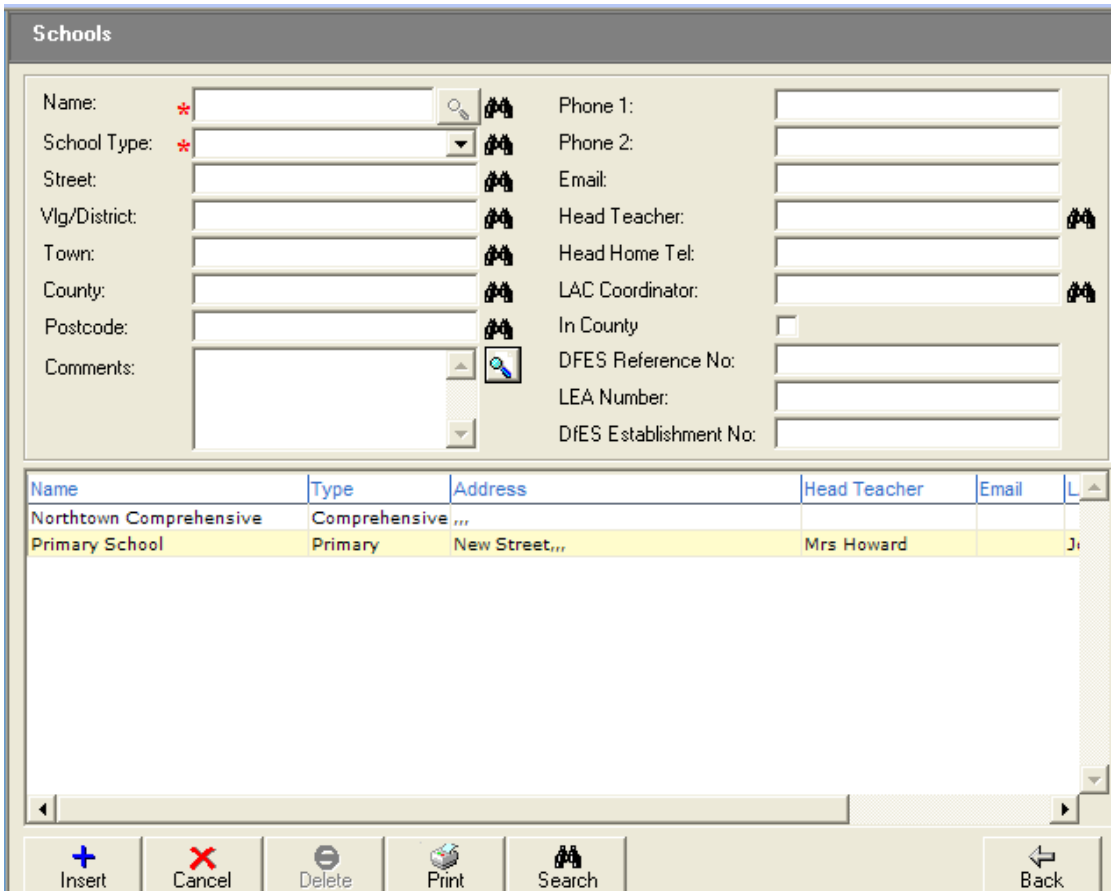
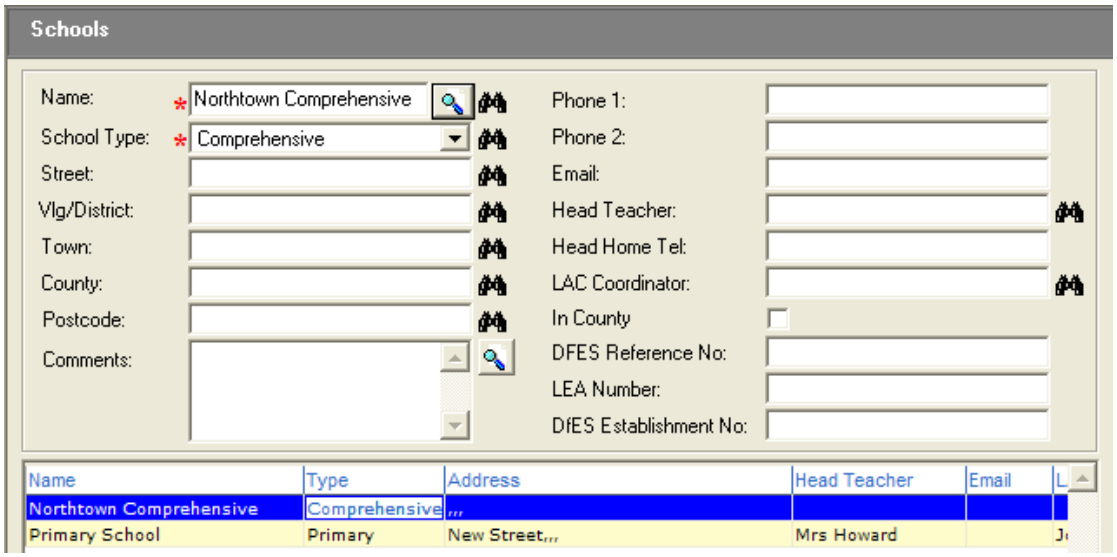


However it also contains the ability to see all the young people attending that school who are currently on CareDirector Youth. You need to click the appropriate school into the top panel:



Next to the name of the school you click on the magnifying glass icon and this will display a list of those young people who are or have attended the school:

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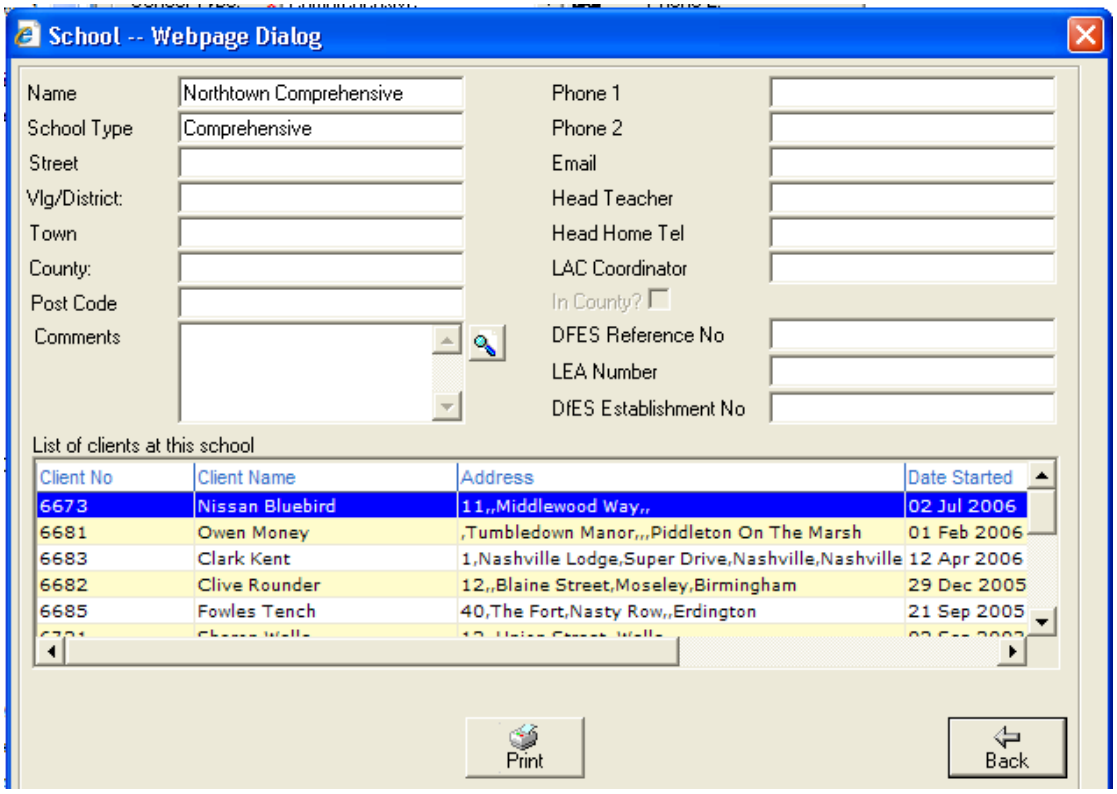
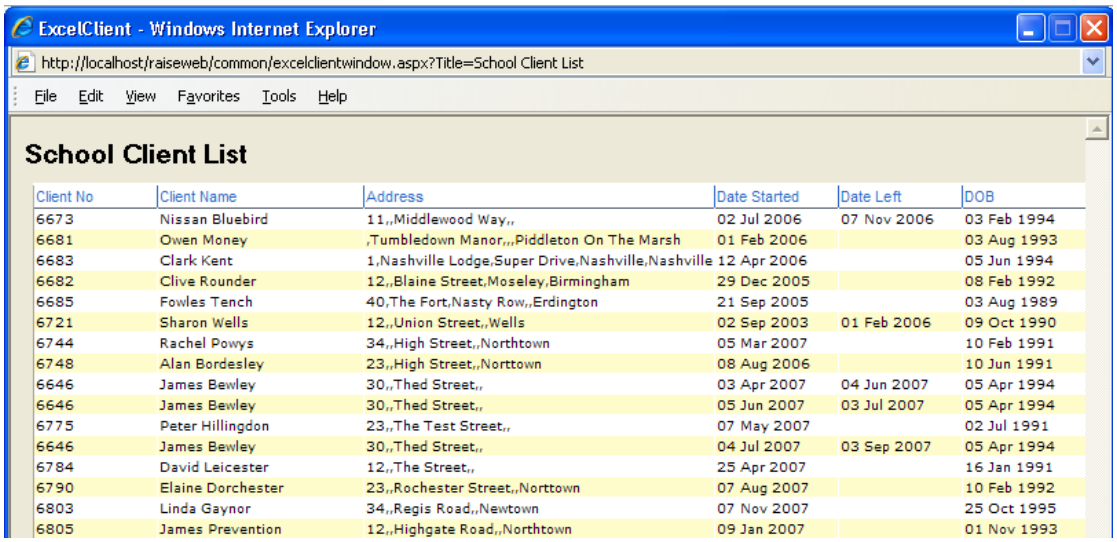


These can be sorted by clicking on the column heads and the results printed off:

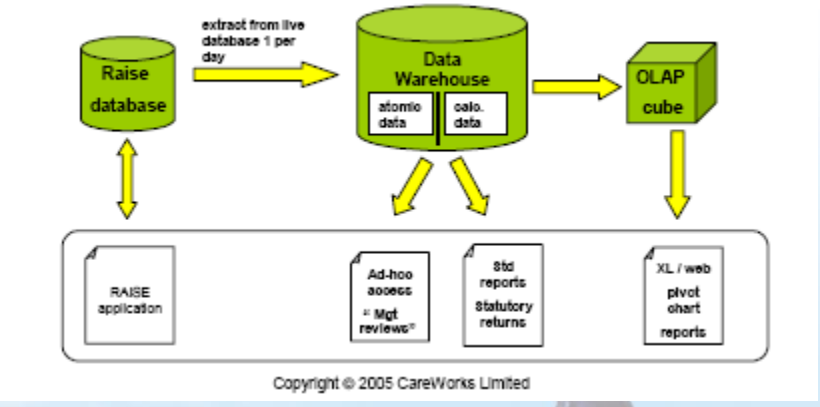

ExcelClient - Windows Internet Explorer
http://localhost/raiseweb/common/excelclientwindow.aspx?Title=School Client List
File Edit View Favorites Tools Help
School Client List
Client No
Client Name
Address
Date Started
Date Left
DOB
6673 Nissan Bluebird 11,,Middlewood Way,, 02 Jul 2006 07 Nov 2006 03 Feb 1994
6681 Owen Money ,Tumbledown Manor,,,Piddleton On The Marsh 01 Feb 2006 03 Aug 1993
6683 Clark Kent 1,Nashville Lodge,Super Drive,Nashville,Nashville 12 Apr 2006 05 Jun 1994
6682 Clive Rounder 12,,Blaine Street,Moseley,Birmingham 29 Dec 2005 08 Feb 1992
6685 Fowles Tench 40,The Fort,Nasty Row,,Erdington 21 Sep 2005 03 Aug 1989
6721 Sharon Wells 12,,Union Street,,Wells 02 Sep 2003 01 Feb 2006 09 Oct 1990
6744 Rachel Powys 34,,High Street,,Northtown 05 Mar 2007 10 Feb 1991
6748 Alan Bordesley 23,,High Street,,Norttown 08 Aug 2006 10 Jun 1991
6646 James Bewley 30,,Thed Street,, 03 Apr 2007 04 Jun 2007 05 Apr 1994
6646 James Bewley 30,,Thed Street,, 05 Jun 2007 03 Jul 2007 05 Apr 1994
6775 Peter Hillingdon 23,,The Test Street,, 07 May 2007 02 Jul 1991
6646 James Bewley 30,,Thed Street,, 04 Jul 2007 03 Sep 2007 05 Apr 1994
6784 David Leicester 12,,The Street,, 25 Apr 2007 16 Jan 1991
6790 Elaine Dorchester 23,,Rochester Street,,Norttown 07 Aug 2007 10 Feb 1992
6803 Linda Gaynor 34,,Regis Road,,Newtown 07 Nov 2007 25 Oct 1995
6805 James Prevention 12,,Highgate Road,,Northtown 09 Jan 2007 01 Nov 1993

Client and Ad Hoc Reports & Statutory Returns

This session describes the structure of the **CareDirector Youth** Data Warehouse and introduces the various tools that are used to produce analyses and reports. It should be noted that this course will concentrate on the CareDirector Youth Warehouse structure and the interaction of the reporting tools with the Warehouse and is not designed to address detailed formatting or advanced features of Microsoft Reporting Services.

The Data Warehouse is a reporting database that sits separately from the CareDirector Youth operational database. The Warehouse is updated once per day from the operational system. This ensures that there is no direct performance impact on the live system from the generation of any reports. Also, the fact that the warehouse is not being dynamically updated ensures consistency in reports that are run repeatedly throughout the day.

The operational system database is designed to handle multiple live interactive sessions simultaneously, while still ensuring speed of data input and update. The requirements for a reporting database are different. The speed of data input is less important than the speed of extraction. Also the ease of use of a reporting database is more important, since users interact directly with the database, whereas users of the operational system interact directly with the application.



The above diagram illustrates the main components of the CareDirector Youth architecture, and a description of each component follows:

CareDirector Youth Database

This is the CareDirector Youth operational database which is accessed and updated by the CareDirector Youth application.

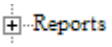
Data Warehouse

This is the reporting database which is updated once a day by an extract from the operational CareDirector Youth database. The extract program restructures the data that is transferred from CareDirector Youth. The warehouse contains two types of data – Atomic data brought directly from CareDirector Youth and Calculated data generated from the atomic data. For example the Client Age

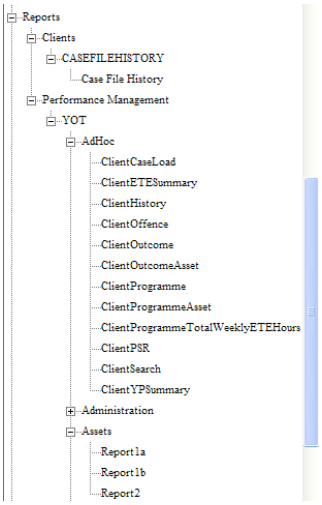
at Date of Referral is calculated data, calculated using the Client Date of Birth, which is atomic data brought into the warehouse during the extract. The Data Warehouse is accessed, for data extraction only, when CareDirector Youth users access the Reports module from within the application. These will include **Client and Ad Hoc Reports** and the **YJB Returns** which are provided by CareWorks, as well as **Customised Reports** that are generated by your own local authority itself.

Accessing the Reports

Note: You will have to be a user that firstly has the reports showing on your menu and you will need to be added to the domain that has access to the data warehouse server.

Once this is achieved you will need to open up the menu item Reports 

. If you click this open you will see a reporting structure similar to the one displayed below:



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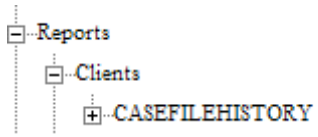
Standard Functions within Reports

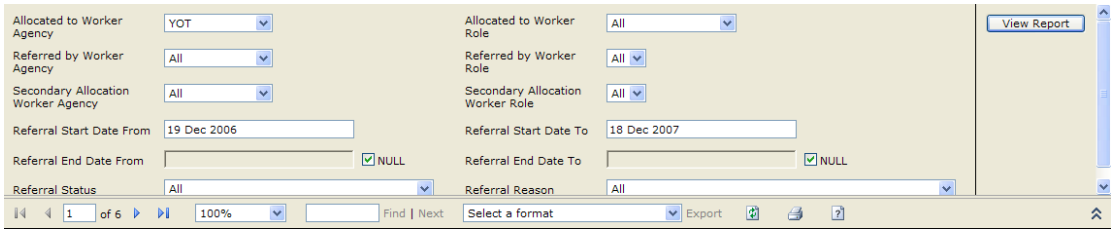
When using reports within **CareDirector Youth** there are standard features that apply to the running of any report.

To create the report you will need to do a single click on the actual report. It is often easy to assume that you are clicking on the right report:



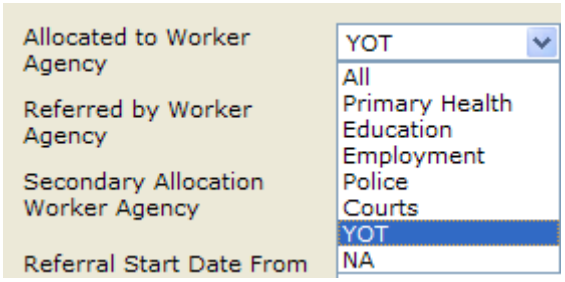
However this is not the final item on the menu tree as shown by the next to 'Case File History'. Clicking on this will reveal the report you will need to click on:

Once the report is running there are other standard processes to be understood as illustrated by the report shown below:



In certain reports you will need to know the young person's Client Number prior to running the report.

In many of the reports you will need to choose values from a drop down to make up your reports:



In addition you may wish to set date parameters:

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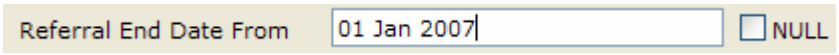
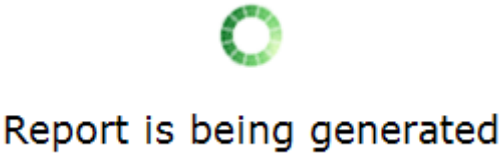
Any field that has a NULL box can be utilised by un-ticking the tick and typing in the required information:



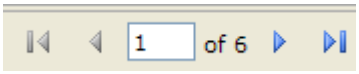
Note: Entries that require a date format must adhere to the format outlined above.

Once you have selected your information you can view the report by clicking on View Report whilst the report is running you will see the following:



In order to hide the search criteria you can click on and this will hide the Report screen. Equally if you want to alter the search criteria of your report then clicking on will reveal the panel for you to make your alterations.

A common mistake on viewing the report is to see the display page as the only one of the report:

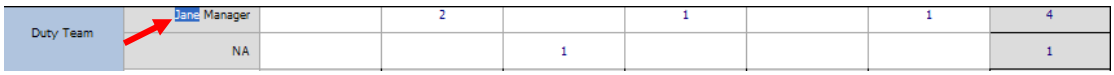


Clicking on will move you to the next page or clicking will take you to the last page.

The size of the page being viewed can be altered using 100%

If you looking for a particular word then you can use Jane Find

This will take you to the first instance of that word within your report:



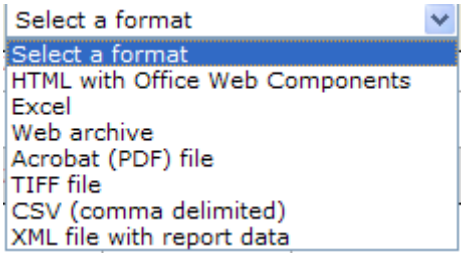
If you that is not the one you are looking for then you click on Find | Next

At any stage you can re-run a report by using the refresh button . As with all buttons there is a tool tip Refresh Report in case you are not sure of the function.

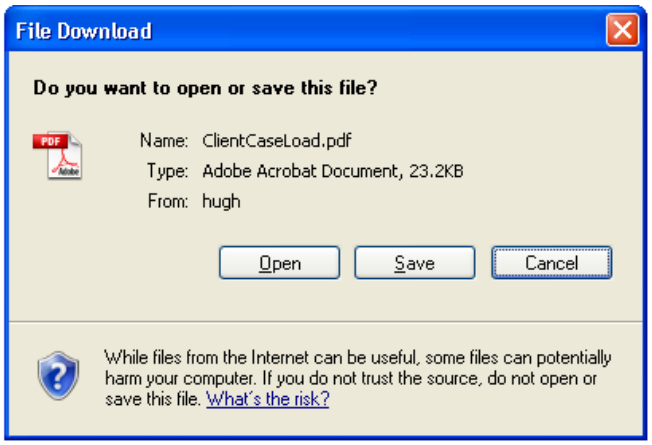
If you want to print any report then utilising the button will start the printing process.

Clicking on will take you to any Help pages that have been set up.

If you want to Export you will need first to select your export format:



Once chosen then you need to click on Export again. In this example the export format is PDF and you will be presented with this screen:


File Download
Do you want to open or save this file?
Name: ClientCaseLoad.pdf
Type: Adobe Acrobat Document, 23.2KB
From: hugh
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

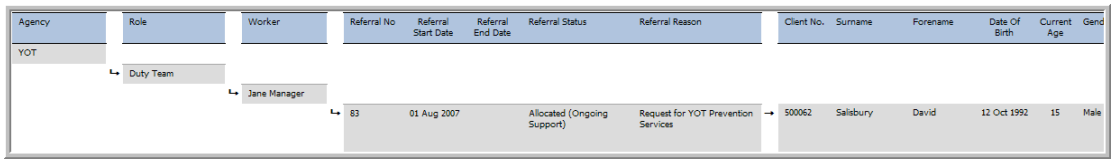
You then make your choices in connection with this message box.

When viewing a report you can always **drill down** on any **count** held in a cell of the report:

Count of distinct Referral(s) by 'Allocated Agency / Role / Worker' & 'Referral Reason'

			Request for YOT Prevention Services	
YOT	Duty Team	Jane Manager	1	1
		Duty Team	1	1
		YOT	1	1
		Total	1	1

Holding the cursor over **a count** such as will turn the cursor into a pointing hand and clicking on the number will reveal the information behind the number:



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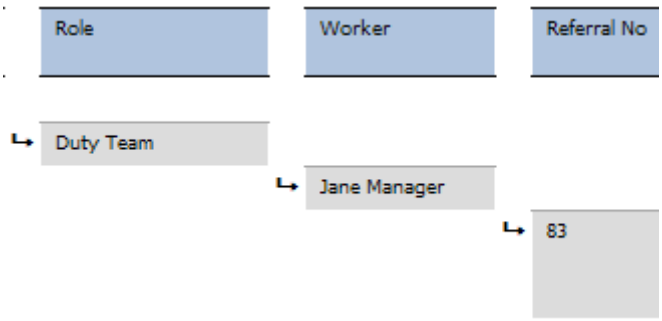
In addition you can see below the **indenting** of each row of information:



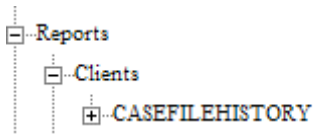
This takes you down through the levels of information and shows the connection between different sets of data.

Client Reports

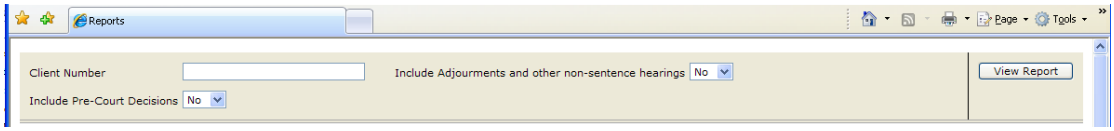
Case File History

This report enables you to see the entire Pre-Court and Court Outcomes and the related Court Hearings and Offences. You can choose whether you want to see Pre-Court Outcomes and whether you want to see all Court Hearings or just those where the young person was sentenced. The purpose of the report is to support your work with the courts.

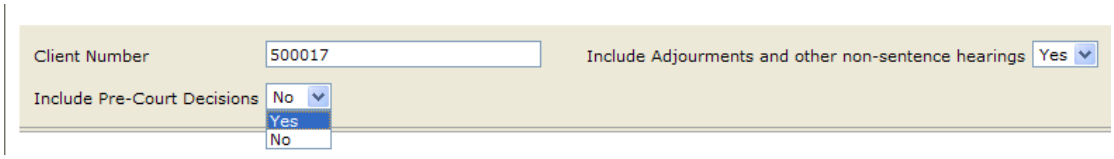
To open this report click on Case File History icon:

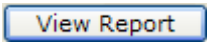


This will reveal the initial screen where you make your choices:



The Client Number will need to be added and a decision as to what to include:



You then click on the button 

and then you will the report as the part illustration shows below:

Case File History

Personal Details

Name: Shireen Seventeen

Date of Birth: 17/01/1989

Address: 17 Test Street Test Town
T17 1AB

History:

Date	Hearing Type	Court Location	Hearing Offences	Bail/Remand Status	Outcome	Offence	Offence Date
04 April 2005	Adjournment	Test Town Youth Court	Possessing A Class C Drug With Intent To Supply	NA			

The offences and offence date will only show when the outcome is delivered:

18 April 2005	Sentence	Test Town Youth Court	Possessing A Class C Drug With Intent To Supply	N/A			
					Action Plan Order (3 Months)	Possessing A Class C Drug With Intent To Supply	01 April 2005
					Order Revoked	Possessing A Class C Drug With Intent To Supply	01 April 2005

It is recommended that if this is to be shown in Court that it is exported to a PDF file as this effectively locks the file.

Ad Hoc Reports

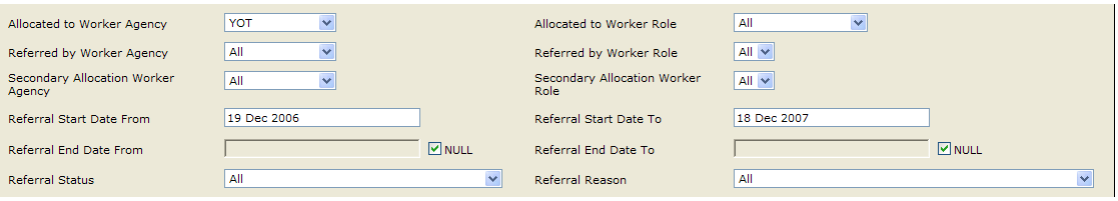
Each of these reports has a number of matrixes which allow you to view the same information from a number of perspectives. For example in Client Caseload you can see the same referrals from either a primary worker or a secondary worker perspective. Once you have decided on your filters and parameters then the report can seen from these distinctive differences.

Client CaseLoad

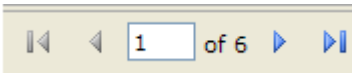
This report consists of 6 matrices each displaying distinct counts of Referral(s) at varying summary levels:

1. Count of distinct Referral(s) by 'Allocated Agency / Role / Worker' & 'Referral Reason'
2. Count of distinct Referral(s) by 'Allocated Agency / Role / Worker' & 'Referral Status'
3. Count of distinct Referral(s) by 'Referred by Agency / Role / Worker' & 'Referral Reason'
4. Count of distinct Referral(s) by 'Referred by Agency / Role / Worker' & 'Referral Status'
5. Count of distinct Referral(s) by 'Secondary Allocation Agency / Role / Worker' & 'Referral Reason'
6. Count of distinct Referral(s) by 'Secondary Allocation Agency / Role / Worker' & 'Referral Status'

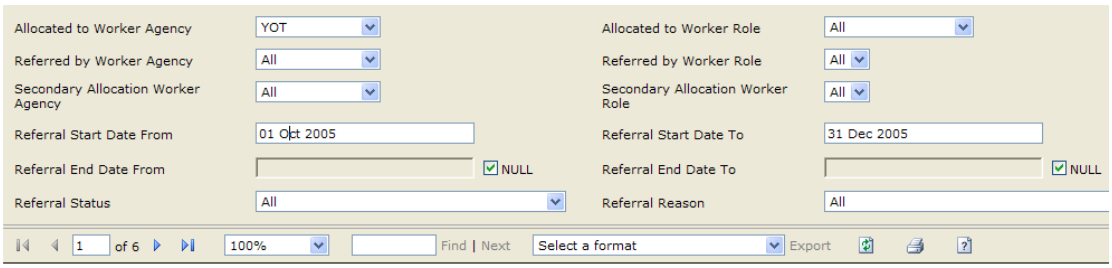
Each of the above will alter dependent upon the search criteria you enter in the search criteria:



When the report has run each of the matrices above can be accessed by going to the corresponding page:



In this example we have created a report for the final quarter of 2005 which shows the different teams within the YOT by worker and by referral reason:



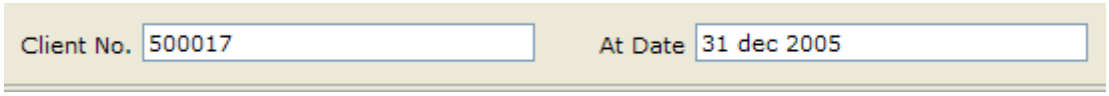
Count of distinct Referral(s) by 'Allocated Agency / Role / Worker' & 'Referral Reason'

			Request for Appropriate Adult Services	Request for YOT Court Services	Notification of Police Reprimand	Request for Final Warning Assesment	Request for YOT Prevention Services	
YOT	Duty Team	Horace Staff	1					1
		Jane Manager		1				1
		Duty Team	1	1				2
	Prevention	George Feckenham			1	1		2
		Rachel Asquith					1	1
		Prevention			1	1	1	3
	Post Court	Calvin Studley		2				2
		Carol Beoley		1				1
		Post Court		3				3
	YOT		1	4	1	1	1	8

Client ETE Summary

This report creates a snapshot of the current Education, Training and Employment of a specific young person. You will need to know the young person's client number for this report.

In the example shown below we are looking at a young person's summary as of the end of December 2005:



Running the report creates the following report:

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Education Training & Employment Summary Report

Shireen Seventeen

Client Detail(s)	
Address	17, Test Street, Test Town
Post Code	
Tel.	
Date of Birth	17 Jan 1989
Age	18
Gender	Female
Ethnicity	Any other Asian background

Education

Start Date	End Date	Type	School	Address	Tel.
01 Sep 1999	26 Jul 2005	Secondary	Testtown Comprehensive	School Road, TY8 7UR	01234567897
02 Sep 1994	21 Jul 1999	Middle School	Northtown Middle School	School Street, Testtown, PE34 6YU	01678765432

Employment

Start Date	End Date	Type	Occupation	Employer	Address	Post Code	Tel.
05 Aug 2005	19 Oct 2005	Full Time	Gardener	Gravesend Council	Gravesend Cemetry,	TR5 6YU	0207876544

View 'Young Person's Summary Report'

You will notice at the bottom a link View 'Young Person's Summary Report' to the Young Person's Summary report. Clicking on this will take you the **chronology** of the young person.

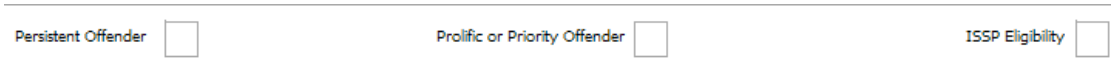
Client History

This report outlines a brief history of the young person and their referrals to the YOT at a given date.

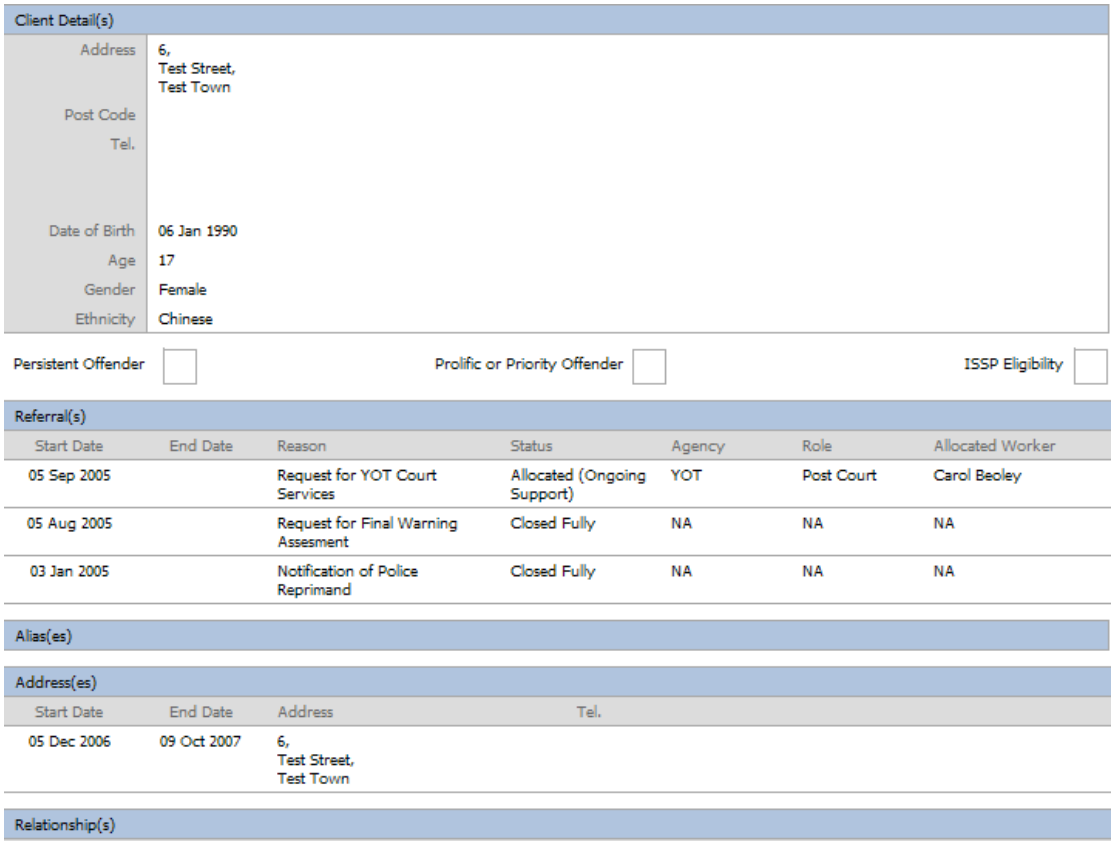
In this example we have asked to look at a young person's history up until the end of 2007:

Where we have asked to render it as a YOT report, this includes data about whether they are Persistent Young Offenders, Prolific or other Priority Offenders or ISSP eligible. Clicking on the button

would remove the following information:



Part of the report is laid out as shown below:



Client Detail(s)

Address	6, Test Street, Test Town
Post Code	
Tel.	
Date of Birth	06 Jan 1990
Age	17
Gender	Female
Ethnicity	Chinese

Persistent Offender ☐ Prolific or Priority Offender ☐ ISSP Eligibility ☐

Referral(s)

Start Date	End Date	Reason	Status	Agency	Role	Allocated Worker
05 Sep 2005		Request for YOT Court Services	Allocated (Ongoing Support)	YOT	Post Court	Carol Bealey
05 Aug 2005		Request for Final Warning Assesment	Closed Fully	NA	NA	NA
03 Jan 2005		Notification of Police Reprimand	Closed Fully	NA	NA	NA

Alias(es)

Address(es)

Start Date	End Date	Address	Tel.
05 Dec 2006	09 Oct 2007	6, Test Street, Test Town	

Relationship(s)

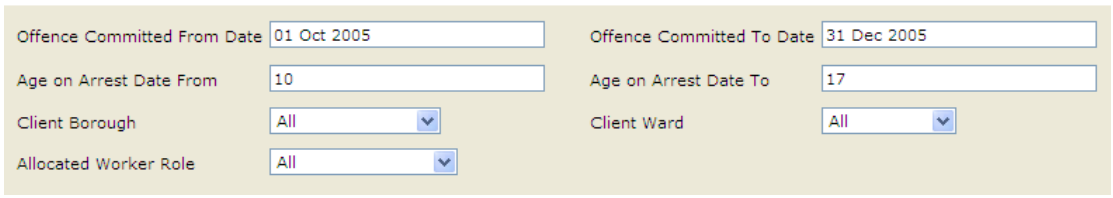
Note: Entries that are blank, such as Alias(es) and Relationships in the example above, are so because no data has been entered into CareDirector Youth.

Client Offence

This report consists of 4 matrices each displaying distinct counts of Client(s) or Offence(s) at varying summary levels:

1. Count of distinct by **Offence Category & Ethnicity Category**
2. Count of distinct by **Offence Category & Ethnicity Category / Gender**
3. Count of distinct by **Offence Category / Offence Type & Ethnicity Category / Ethnicity Type**
4. Count of distinct by **Offence Category / Offence Type & Ethnicity Category / Ethnicity Type / Gender**

Each of the above will alter dependent upon the search criteria you enter below:



When the report has run each of the matrices above can be accessed by going to the corresponding page:

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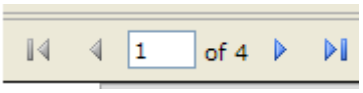


In the instance below you are looking at the first of the matrices:

Count of distinct Client(s) by 'Offence Category' & 'Ethnicity Category'

	Breach Of Statutory Order	Criminal Damage	Domestic Burglary	Drugs	Fraud And Forgery	Motoring Offences	Public Order	Robbery	Sexual Offences	Theft And Handling Stolen Goods	Vehicle Theft / Unauthorised Taking	Violence Against The Person	
NA			1										1
Asian or Asian British	1	2	1				1					1	5
White		2		2		1		1		1	1		6
Mixed		1	1						1	1	1		4
Black or Black British	1				1					1			3

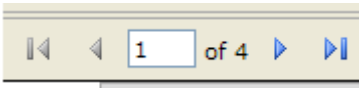
Client Outcomes

This report consists of 4 matrices each displaying distinct counts of Client(s) or Outcome(s) at varying summary levels:

1. Count of distinct by **Outcome Tier and Ethnicity Category**
2. Count of distinct by **Outcome Tier and Ethnicity Category / Gender**
3. Count of distinct by **Outcome Tier / Outcome and Ethnicity Category / Ethnicity Type**
4. Count of distinct by **Outcome Tier / Outcome and Ethnicity Category / Ethnicity Type / Gender**

Each of the above will alter dependent upon the search criteria you enter below:

When the report has run each of the matrices above can be accessed by going to the corresponding page:



In the instance below you are looking at the first of the matrices:

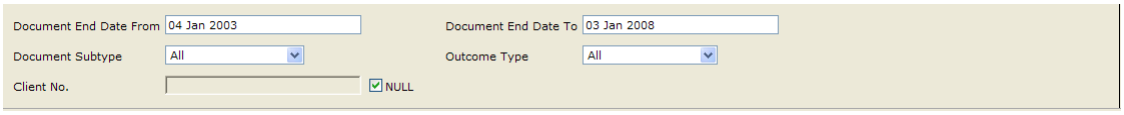
Count of distinct Client(s) by 'Outcome Tier' & 'Ethnicity Category'

	custodial	community penalties	first-tier	pre-court	NA	
NA		1	1	1	1	1
Asian or Asian British	1	2	2	4	1	5
White	1	3	4	3	2	6
Mixed	1	3	3	4	2	4
Black or Black British	1		1	2	1	3
Chinese or other ethnic group			2	3	2	3
Total	4	9	13	17	9	22

Client Outcome Asset

This report consists of a single matrix displaying distinct counts of Client(s) by 'Case Stage / YOT Asset Score' & 'Asset Section'.

The above will alter dependent upon the search criteria you enter below:



When the report has run you will see the following:

Count of distinct Client(s) by 'Case Stage / YOT Asset Score' & 'Asset Section'

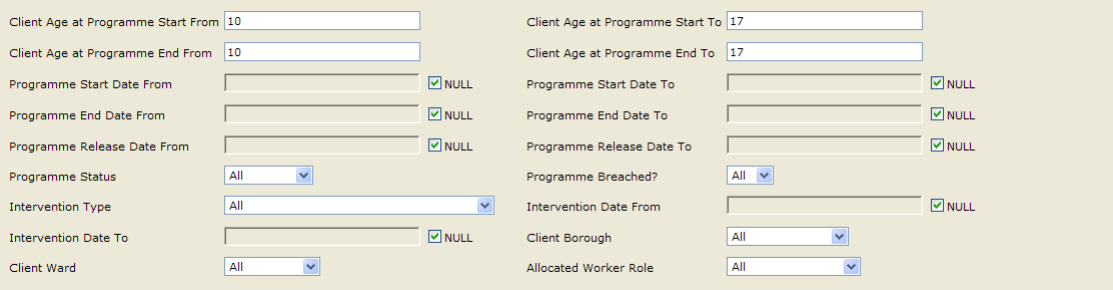
		Living Arrangements	Family & Personal Relationships	Education, Training & Employment	Neighbourhood	Lifestyle	Substance Use	Physical Health	Emotional & Mental Health	Perception of Self & Others	Thinking & Behaviour	Attitude to Offending	Motivation to Change
Start Asset	0	5	5	5	5	6	8	7	7	8	8	6	7
	1		1	1		1	1	3		1			1
	2	4	3	3	3				3	2	2	3	1
	3		1	1	3	2	1	1	1				
	4	3		2		2	2					1	2
	Start Asset	10	10	10	10	10	10	10	10	10	10	10	10
End Asset	0	7	5	7	6	7	8	6	7	7	7	7	8
	1	1	2	1	1	1	1	3		1	1		1
	2	2	1	1	1				1	1	1	2	
	3		1	1	2	1			1				
	4	1					1						
	End Asset	9	9	9	9	9	9	9	9	9	9	9	9

Client Programmes

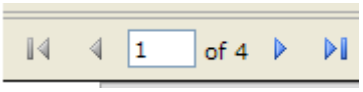
This report consists of 4 matrices each displaying distinct counts of Client(s) at varying summary levels:

1. Count of distinct Client(s) by **Programme Type and Total Weekly ETE Hours**
2. Count of distinct Client(s) by **Programme Type / Total Weekly ETE Hours and Ethnicity Category**
3. Count of distinct Client(s) by **Programme Type / Total Weekly ETE Hours and Ethnicity Category / Ethnicity Type**
4. Count of distinct Client(s) by **Programme Type / Total Weekly ETE Hours and Ethnicity Category / Ethnicity Type / Gender**

Each of the above will alter dependent upon the search criteria you enter below:


Client Age at Programme Start From 10
Client Age at Programme Start To 17
Client Age at Programme End From 10
Client Age at Programme End To 17
Programme Start Date From NULL
Programme Start Date To NULL
Programme End Date From NULL
Programme End Date To NULL
Programme Release Date From NULL
Programme Release Date To NULL
Programme Status All
Programme Breached? All
Intervention Type All
Intervention Date From NULL
Intervention Date To NULL
Client Borough All
Client Ward All
Allocated Worker Role All

When the report has run each of the matrices above can be accessed by going to the corresponding page:



In the instance below you are looking at the section of the second matrix:

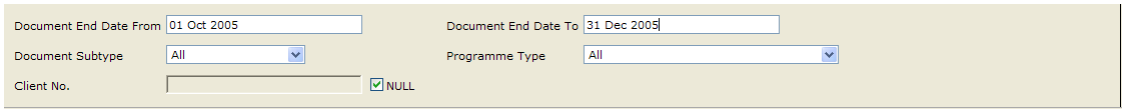
Count of distinct Client(s) by 'Programme Type' & 'Ethnicity Category / Gender'

		Parenting Programme (Voluntary)	Supervision Order Programme	Referral Order Programme	Action Plan Programme	Remand Management Programme
NA	Male		1	1	1	
	Subtotal		1	1	1	
Asian or Asian British	Male	1		1		1
	Female		1	1		1
	Subtotal	1	1	2		2
White	Male	1	1	1		1
	Female	1		2	1	
	Subtotal	2	1	3	1	1
	Male			2	2	1

Client Programme Asset

This report consists of a single matrix displaying distinct counts of Client(s) by Case Stage / YOT Asset Score and Asset Section.

The above will alter dependent upon the search criteria you enter below:



When the report has run you will see a report similar to the one below:

Count of distinct Client(s) by 'Case Stage / YOT Asset Score' & 'Asset Section'

		Living Arrangements	Family & Personal Relationships	Education, Training & Employment	Neighbourhood	Lifestyle	Substance Use	Physical Health	Emotional & Mental Health	Perception of Self & Others	Thinking & Behaviour	Attitude to Offending	Motivation to Change
End Asset	0	6	6	6	6	6	6	6	6	6	6	6	6
	End Asset	6	6	6	6	6	6	6	6	6	6	6	6

Client Programme Total Weekly ETE Hours

This report consists of 4 matrices each displaying distinct counts of Client(s) at varying summary levels in relation to programmes and education,training and employment:

1. Count of distinct Client(s) by **Programme Type and Total Weekly ETE Hours**
2. Count of distinct Client(s) by **Programme Type / Total Weekly ETE Hours and Ethnicity Category**
3. Count of distinct Client(s) by **Programme Type / Total Weekly ETE Hours and Ethnicity Category / Ethnicity Type**
4. Count of distinct Client(s) by **Programme Type / Total Weekly ETE Hours and Ethnicity Category / Ethnicity Type / Gender**

Each of the above will alter dependent upon the search criteria you enter below:

In the instance below you are looking at the section of the fourth matrix:

Count of distinct Client(s) by 'Programme Type / Total Weekly ETE Hour(s)' & 'Ethnicity Category / Ethnicity Type / Gender'

			Parenting Programme (Voluntary)		Supervision Order Programme		Referral Order Programme		Action Plan
			0-15	25+	0-15	25+	0-15	25+	0-15
NA	Not Known	Male				1		1	
		Subtotal				1		1	
Asian or Asian British	Any other Asian background	Female			1		1		
		Subtotal			1		1		
	Bangladeshi	Male						1	
		Subtotal						1	
	Indian	Male	1						
		Subtotal	1						

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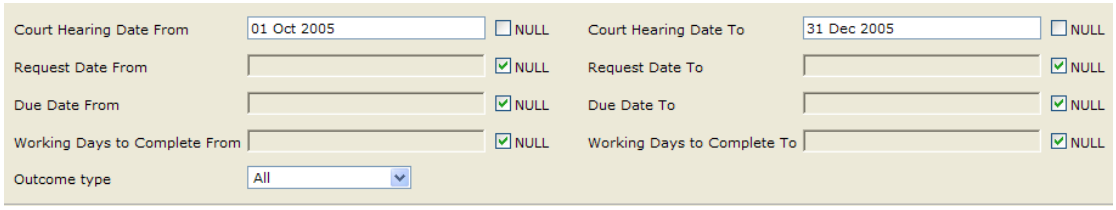
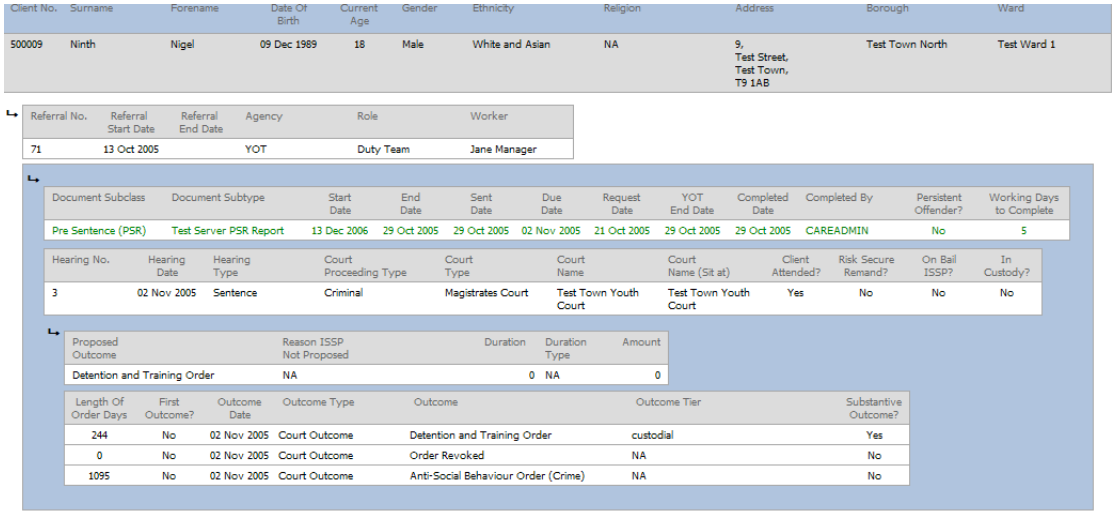
Client PSR

This report enables you to see Pre-Sentence R within the context of their client, the referral, the proposal to court, the relevant sentence hearing and the outcome.

The report will alter dependent upon the search criteria you enter below:



In the example below you will a sample of PSRs that are related to young people within a reporting quarter:



Client No.	Surname	Forename	Date Of Birth	Current Age	Gender	Ethnicity	Religion	Address	Borough	Ward
500009	Ninth	Nigel	09 Dec 1989	18	Male	White and Asian	NA	9, Test Street, Test Town, T9 1AB	Test Town North	Test Ward 1

Referral No.	Referral Start Date	Referral End Date	Agency	Role	Worker
71	13 Oct 2005		YOT	Duty Team	Jane Manager

Document Subclass	Document Subtype	Start Date	End Date	Sent Date	Due Date	Request Date	YOT End Date	Completed Date	Completed By	Persistent Offender?	Working Days to Complete
Pre Sentence (PSR)	Test Server PSR Report	13 Dec 2006	29 Oct 2005	29 Oct 2005	02 Nov 2005	21 Oct 2005	29 Oct 2005	29 Oct 2005	CAREADMIN	No	5

Hearing No.	Hearing Date	Hearing Type	Court Proceeding Type	Court Type	Court Name	Court Name (Sit at)	Client Attended?	Risk Secure Remand?	On Bail ISSP?	In Custody?
3	02 Nov 2005	Sentence	Criminal	Magistrates Court	Test Town Youth Court	Test Town Youth Court	Yes	No	No	No

Proposed Outcome	Reason ISSP Not Proposed	Duration	Duration Type	Amount
Detention and Training Order	NA	0	NA	0

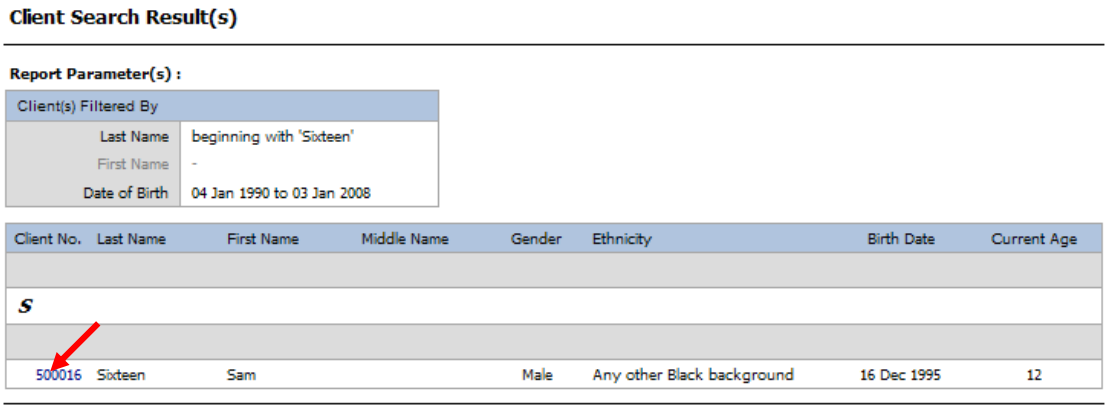
Length Of Order Days	First Outcome?	Outcome Date	Outcome Type	Outcome	Outcome Tier	Substantive Outcome?
244	No	02 Nov 2005	Court Outcome	Detention and Training Order	custodial	Yes
0	No	02 Nov 2005	Court Outcome	Order Revoked	NA	No
1095	No	02 Nov 2005	Court Outcome	Anti-Social Behaviour Order (Crime)	NA	No

Client Search

This report enables you to search for a particular Client by name.

The above will alter dependent upon the search criteria you enter below:

The displayed result will look like this:



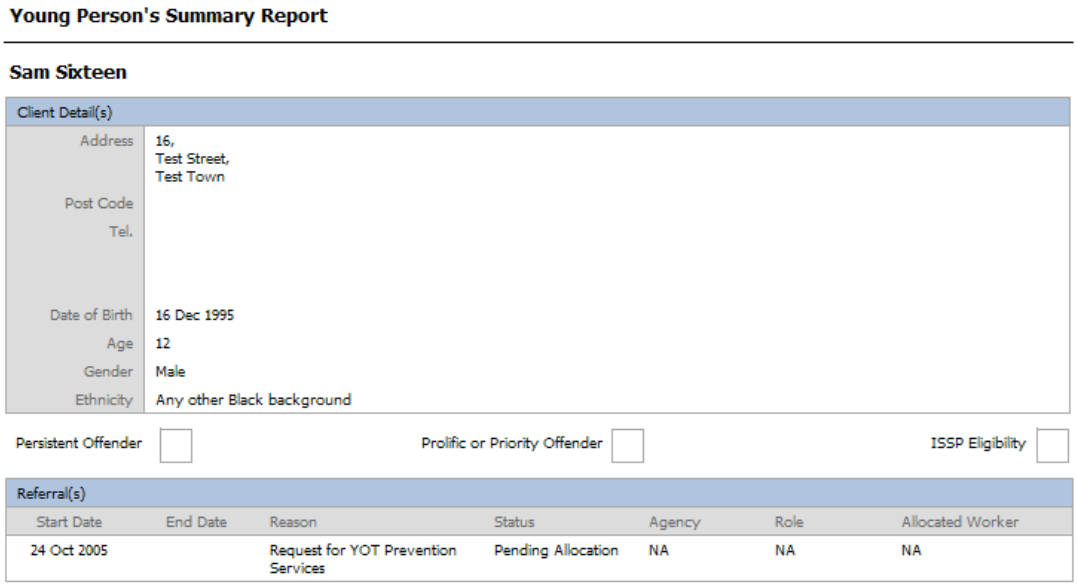
Client Search Result(s)

Report Parameter(s) :

Client(s) Filtered By	
Last Name	beginning with 'Sixteen'
First Name	-
Date of Birth	04 Jan 1990 to 03 Jan 2008

Client No.	Last Name	First Name	Middle Name	Gender	Ethnicity	Birth Date	Current Age
S							
500016	Sixteen	Sam		Male	Any other Black background	16 Dec 1995	12

If you click on the arrowed client number it will open up the Client Summary Report:



Young Person's Summary Report

Sam Sixteen

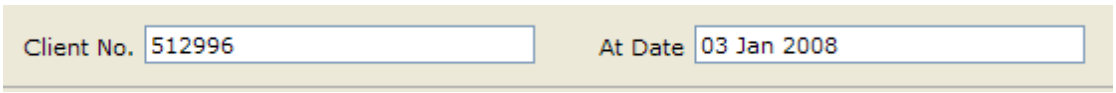
Client Detail(s)	
Address	16, Test Street, Test Town
Post Code	
Tel.	
Date of Birth	16 Dec 1995
Age	12
Gender	Male
Ethnicity	Any other Black background

Persistent Offender ☐ Prolific or Priority Offender ☐ ISSP Eligibility ☐

Referral(s)						
Start Date	End Date	Reason	Status	Agency	Role	Allocated Worker
24 Oct 2005		Request for YOT Prevention Services	Pending Allocation	NA	NA	NA

Young Persons Summary Report

This report shows the complete history of a young person and as illustrated above this report can also be accessed via the Client Search report. However for this particular version you need to know the client's ID number.



The reports will show:

- Referrals
- Aliases
- Addresses
- Relationships

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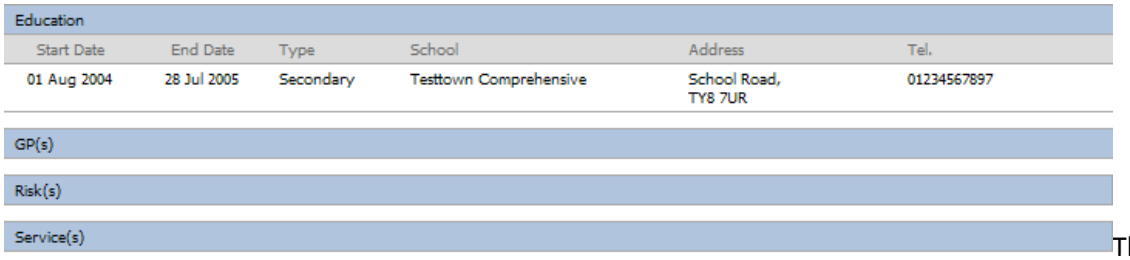
- Education
- Employment
- General Practitioner
- Risk(s)
- Services
- Offences
- Hearings
- Outcomes
- Programmes
- Pre-Court Outcomes

Obviously if information has not been entered then there will be no entry as in the illustration below:

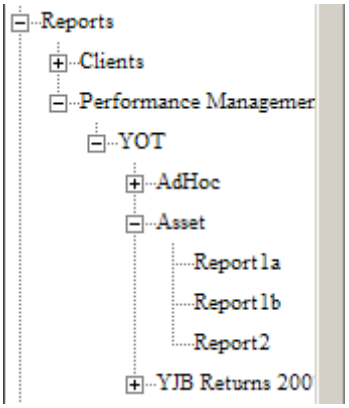


This has tended to be used for checking that essential information has been recorded against a young person.

Asset Report 1a, 1b and 2

These reports have been developed to allow you to interrogate Assets at a high level by scores, risks or vulnerability and to see which are missing.

They are accessed from the Reports function on the left hand side.



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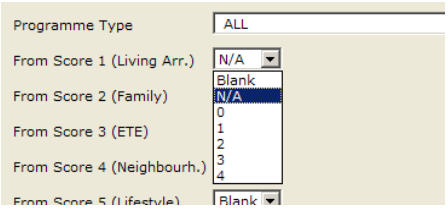
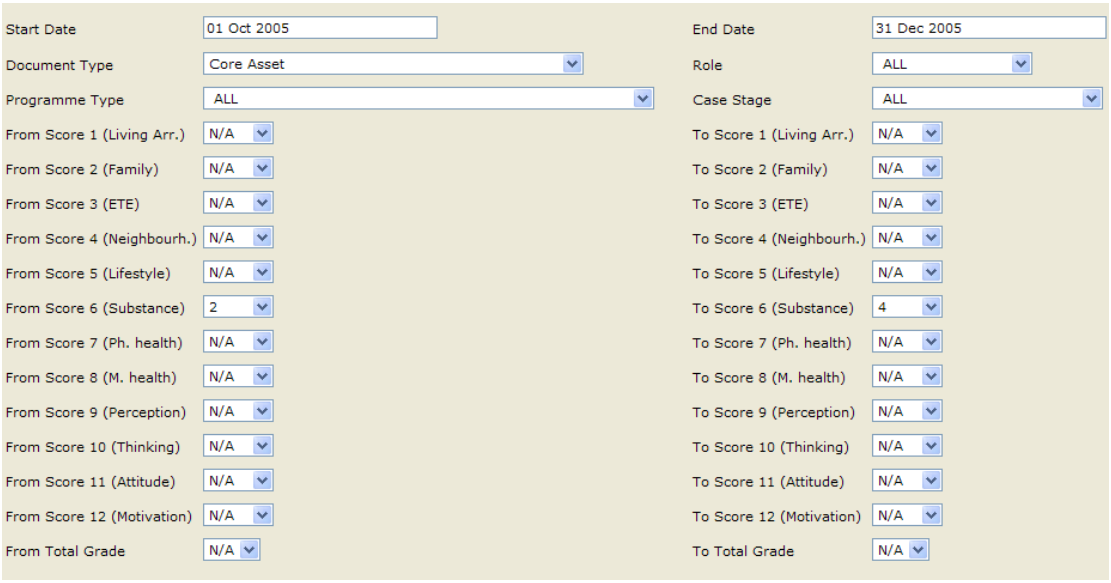
Report 1a

This report allows the user to search for particular Assets or other documents, related to particular programmes, particular teams and/or case stages and if they are Assets or Onsets to be able to search for ranges of scores on particular sections or for a range within the overall score.

Note: If a user wants a particular section to be ignored then they should enter the value of N/A:



This illustration shows a search within quarter 4 of a particular year for all Core Assets with a Substance Misuse score between 2 and 4:

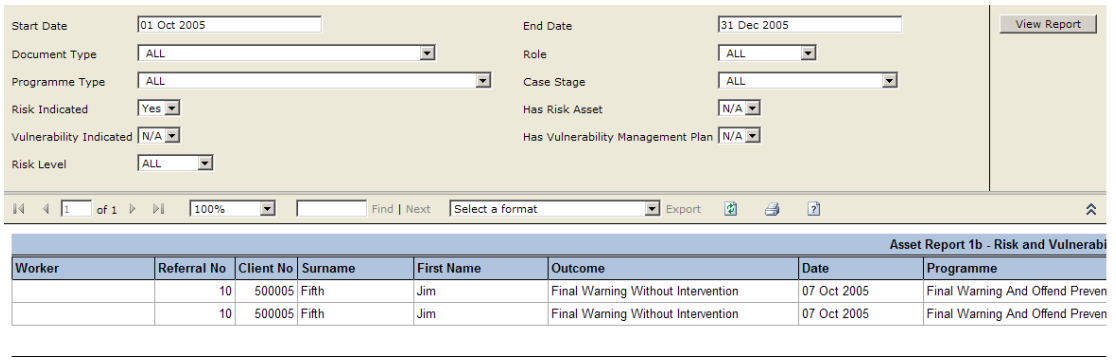


One of aspects that you have to remember is that if you add additional scores that you wish to search on then CareDirector Youth will only return those that have all the requisite scores and not each individual score.

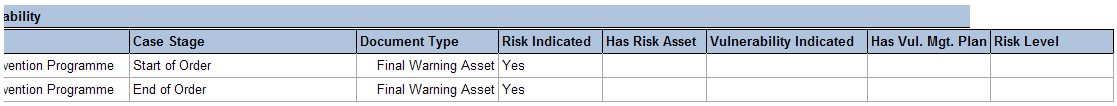
Report Asset 1b

This report allows you to search for particular Core Assets, Final Warning Assets and Onsets related to particular programmes, particular teams and/or case stages and if there are indications of risk or vulnerability these can be viewed. If the latter are present you can then query whether the associated Risk Asset or Vulnerability Management Plan is present as a document.

In the illustration you have asked to see all documents between set dates that had a Yes in the Risk Section of an Asset:

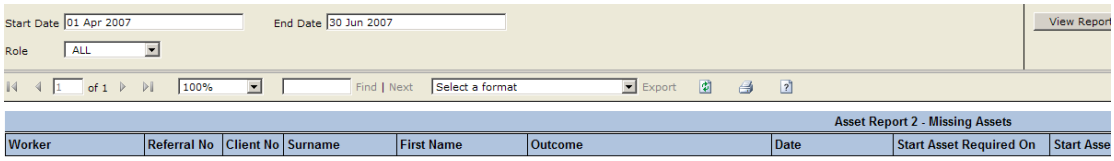

Start Date 01 Oct 2005
End Date 31 Dec 2005
View Report
Document Type ALL
Role ALL
Programme Type ALL
Case Stage ALL
Risk Indicated Yes
Has Risk Asset N/A
Vulnerability Indicated N/A
Has Vulnerability Management Plan N/A
Risk Level ALL
of 1
100%
Find | Next
Select a format
Export
Asset Report 1b - Risk and Vulnerabi
Worker | Referral No | Client No | Surname | First Name | Outcome | Date | Programme
10 | 500005 | Fifth | Jim | Final Warning Without Intervention | 07 Oct 2005 | Final Warning And Offend Preven
10 | 500005 | Fifth | Jim | Final Warning Without Intervention | 07 Oct 2005 | Final Warning And Offend Preven

Scrolling to the right will reveal further information:

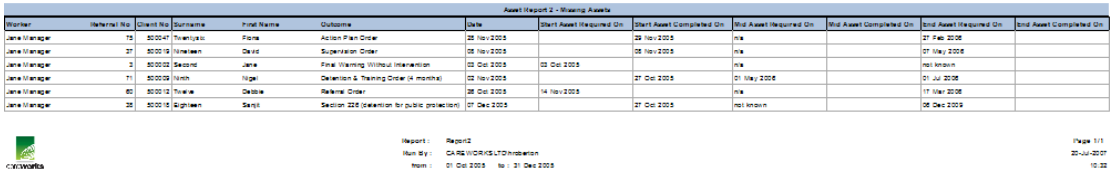

ability
Case Stage | Document Type | Risk Indicated | Has Risk Asset | Vulnerability Indicated | Has Vul. Mgt. Plan | Risk Level
vention Programme | Start of Order | Final Warning Asset | Yes
vention Programme | End of Order | Final Warning Asset | Yes

Asset Report 2

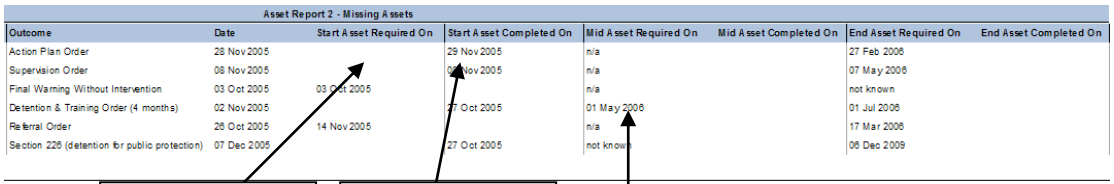
This report identifies any missing Assets between given dates and against all or a specific team:


Start Date 01 Apr 2007
End Date 30 Jun 2007
View Report
Role ALL
of 1
100%
Find | Next
Select a format
Export
Asset Report 2 - Missing Assets
Worker | Referral No | Client No | Surname | First Name | Outcome | Date | Start Asset Required On | Start Asse

When run is complete the report will appear as below:



Scrolling to the right will reveal additional information:


Asset Report 2 - Missing Assets
Outcome | Date | Start Asset Required On | Start Asset Completed On | Mid Asset Required On | Mid Asset Completed On | End Asset Required On | End Asset Completed On
Action Plan Order | 28 Nov 2005 | | 29 Nov 2005 | n/a | | 27 Feb 2006 |
Supervision Order | 08 Nov 2005 | | 08 Nov 2005 | n/a | | 07 May 2006 |
Final Warning Without Intervention | 03 Oct 2005 | 03 Oct 2005 | | n/a | | not known |
Detention & Training Order (4 months) | 02 Nov 2005 | | 27 Oct 2005 | 01 May 2006 | | 01 Jul 2006 |
Referral Order | 26 Oct 2005 | 14 Nov 2005 | | n/a | | 17 Mar 2006 |
Section 226 (detention for public protection) | 07 Dec 2005 | | 27 Oct 2005 | not known | | 06 Dec 2009 |

If the box is empty in the *Required On* field then the Asset **has**

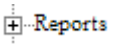
A date in any *Completed On* box confirms that the Asset **has** been

A date in any of the *Required On* fields indicates that the Asset **has not** been done

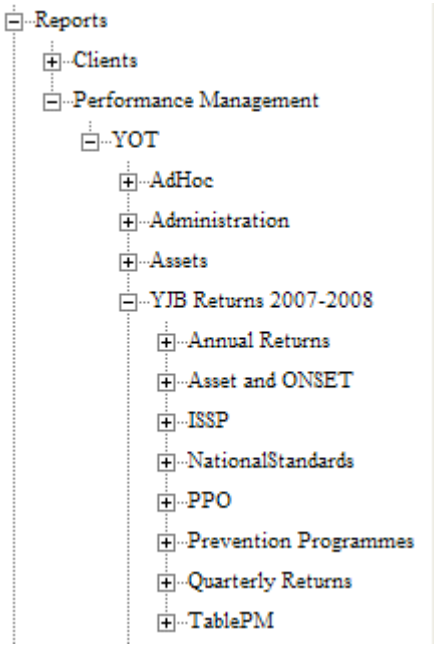
Statutory Returns

These are the reports that are required by the Youth Justice Board on a quarterly and annual basis.

Note: You will have to be a user that firstly has the reports showing on your menu and you will need to be added to the domain that has access to the data warehouse server.

Once this is achieved you will need to open up the menu item Reports 

. If you click this open you will see a reporting structure similar to the one displayed below:



You will then proceed in exactly the same way as previously outlined in the Ad Hoc section.

OLAP Cubes

These cubes allow you to construct ad hoc reports within the reporting constraints of the cubes and to save these reports for further use.

Note: It is important to point out that a good working knowledge of Microsoft Excel will greatly assist you in using this facility. It is recommended that you should be proficient in Excel and understand in particular Charts and Pivot tables.

The reports are accessed from wherever the two appropriate spreadsheets are held. These can be on your PC or on the server hosting the warehouse. The first of these is the **raise_warehouse_yot** which shows all the available fifty-six cubes and the Configuration tab and can be used for ad hoc reports and to familiarise yourself with the content of the cubes. The second of these is called **raise_warehouse_template** and this is blank worksheet that can be used to construct reports that you wish to use on a regular basis.

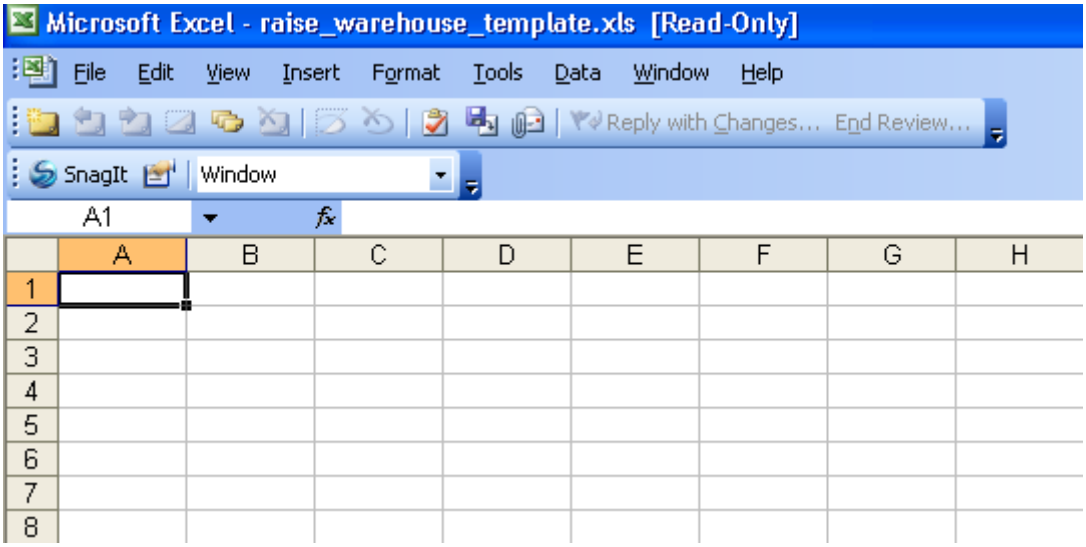
How to Build a Report from an OLAP Cube

To build a report in Excel from an OLAP cube, there are two steps.

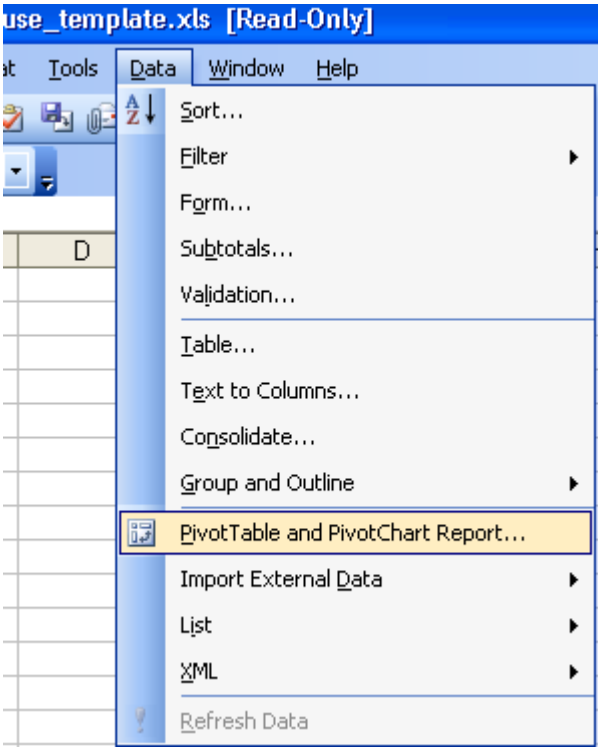
1. You select the data source.
2. You drag/drop the required fields/dimensions to build the desired Pivot table. Optionally, you can then create a chart.

Select the Data Source

Make sure you do not have an existing Pivot table selected (i.e. click on an empty cell on the sheet) otherwise you will edit the existing pivot table, rather than create a new one:


Microsoft Excel - raise_warehouse_template.xls [Read-Only]
File Edit View Insert Format Tools Data Window Help
Reply with Changes... End Review...
SnagIt Window
A1
A B C D E F G H
1 2 3 4 5 6 7 8

From the Main Menu in Excel you select Data -> Pivot Table and PivotChart Report:



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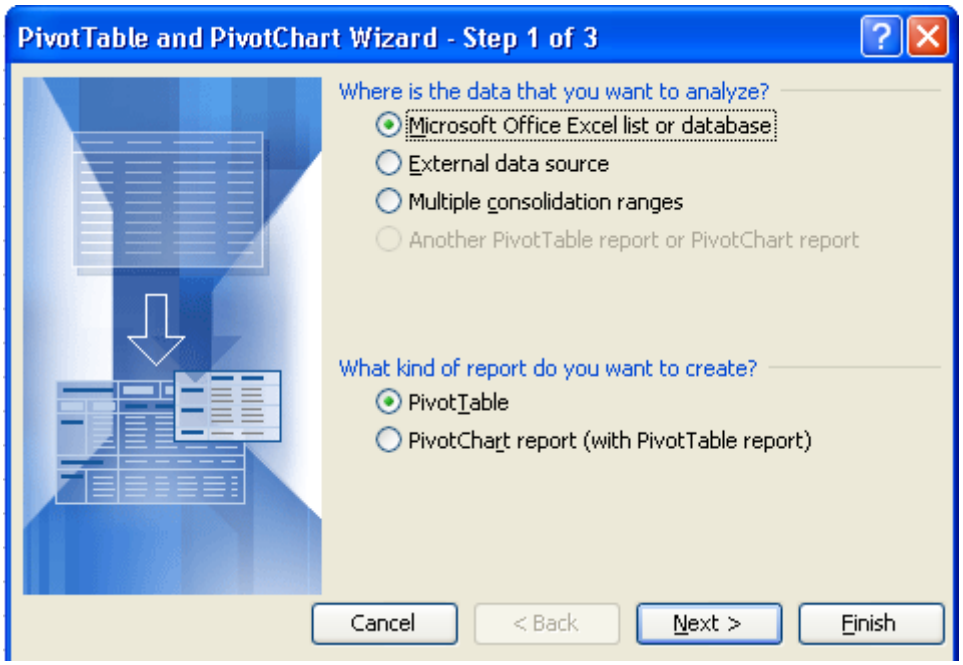
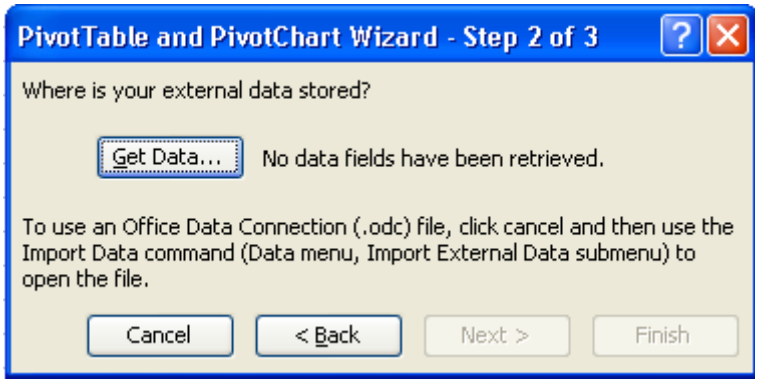
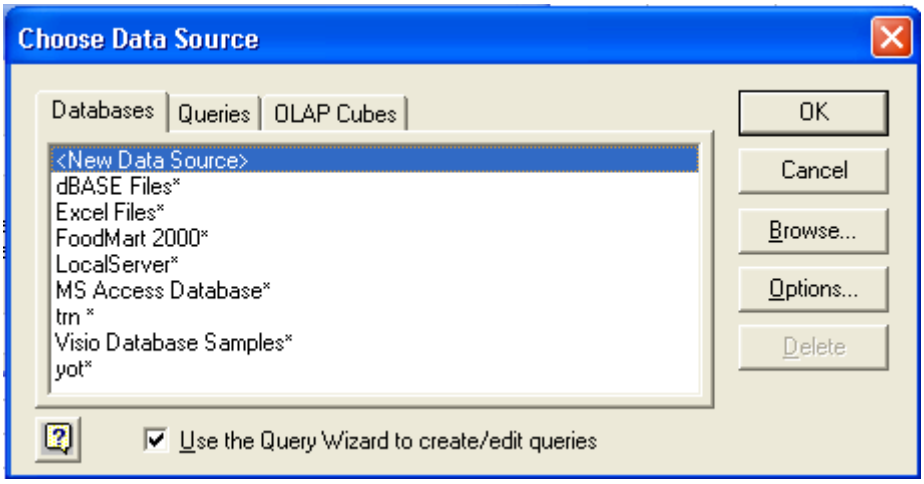
This will reveal the following:


PivotTable and PivotChart Wizard - Step 1 of 3
Where is the data that you want to analyze?
Microsoft Office Excel list or database
External data source
Multiple consolidation ranges
Another PivotTable report or PivotChart report
What kind of report do you want to create?
PivotTable
PivotChart report (with PivotTable report)
Cancel
< Back
Next >
Finish

Click on the 'External data source' option, and then click Next:

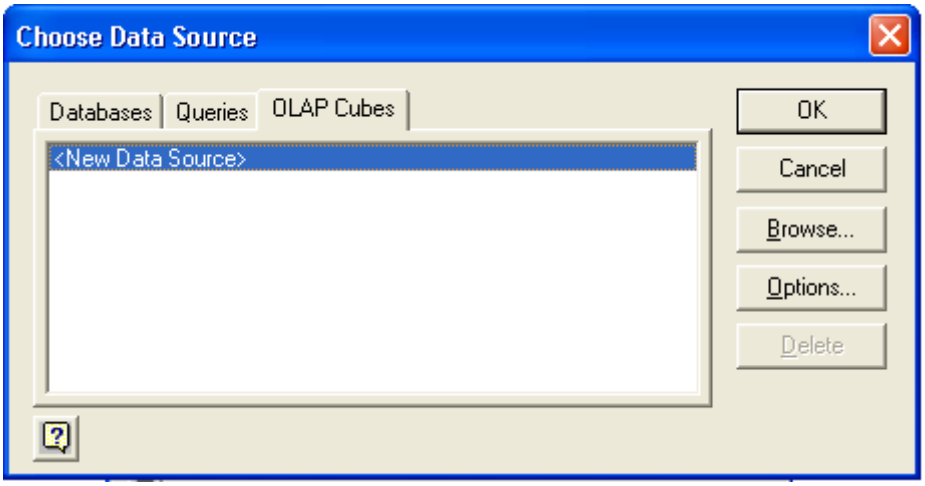

PivotTable and PivotChart Wizard - Step 2 of 3
Where is your external data stored?
Get Data...
No data fields have been retrieved.
To use an Office Data Connection (.odc) file, click cancel and then use the Import Data command (Data menu, Import External Data submenu) to open the file.
Cancel
< Back
Next >
Finish

Click on Get Data:



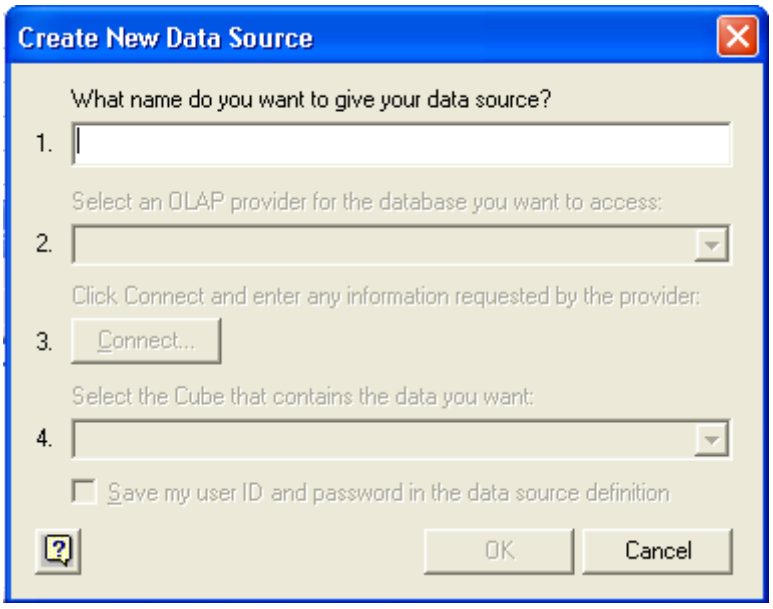
Note: An alternative route to this is to select Data -> Import External Data -> New Database Query …. Either route will work fine.

You click on the OLAP cubes tab:



Note: As you build your queries it will be the case that your desired data source might appear in the list, select it and proceed as shown later.

To create a new data source, select New Data Source and click on OK and you will be presented with the dialog box as shown:


Create New Data Source
What name do you want to give your data source?
1.
Select an OLAP provider for the database you want to access:
2.
Click Connect and enter any information requested by the provider:
3.
Connect...
Select the Cube that contains the data you want:
4.
Save my user ID and password in the data source definition
OK
Cancel

Enter the name of the cube you want to connect to (you can give it any descriptive name you like here):

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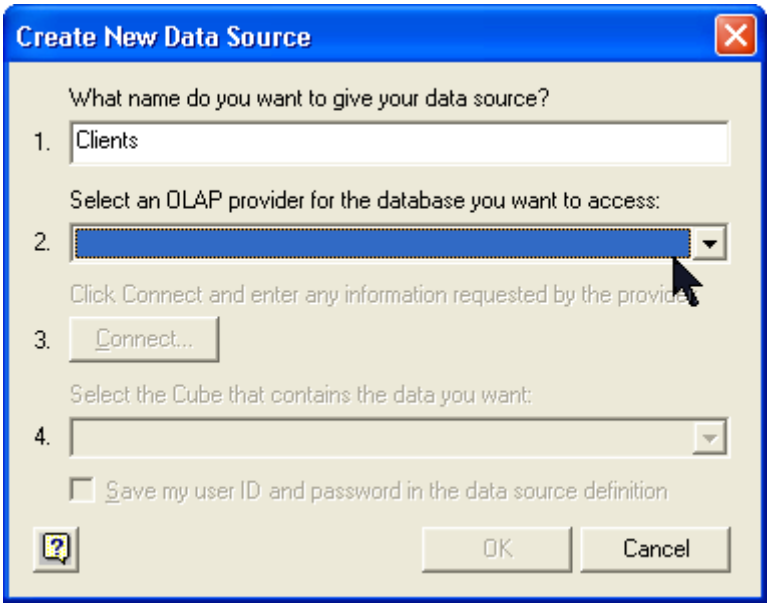
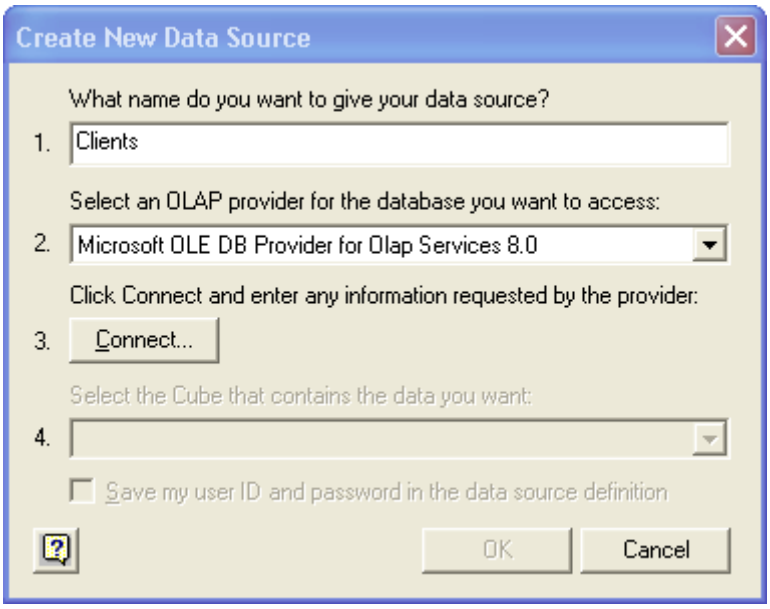

Create New Data Source
What name do you want to give your data source?
1.
Clients
Select an OLAP provider for the database you want to access:
2.
Click Connect and enter any information requested by the provide
3.
Connect...
Select the Cube that contains the data you want:
4.
Save my user ID and password in the data source definition
OK
Cancel

Make sure you select version 8.0 of the OLAP provider. Click on Connect:


Create New Data Source
What name do you want to give your data source?
1.
Clients
Select an OLAP provider for the database you want to access:
2.
Microsoft OLE DB Provider for Olap Services 8.0
Click Connect and enter any information requested by the provider:
3.
Connect...
Select the Cube that contains the data you want:
4.
Save my user ID and password in the data source definition
OK
Cancel

On this screen you enter the name of your server:

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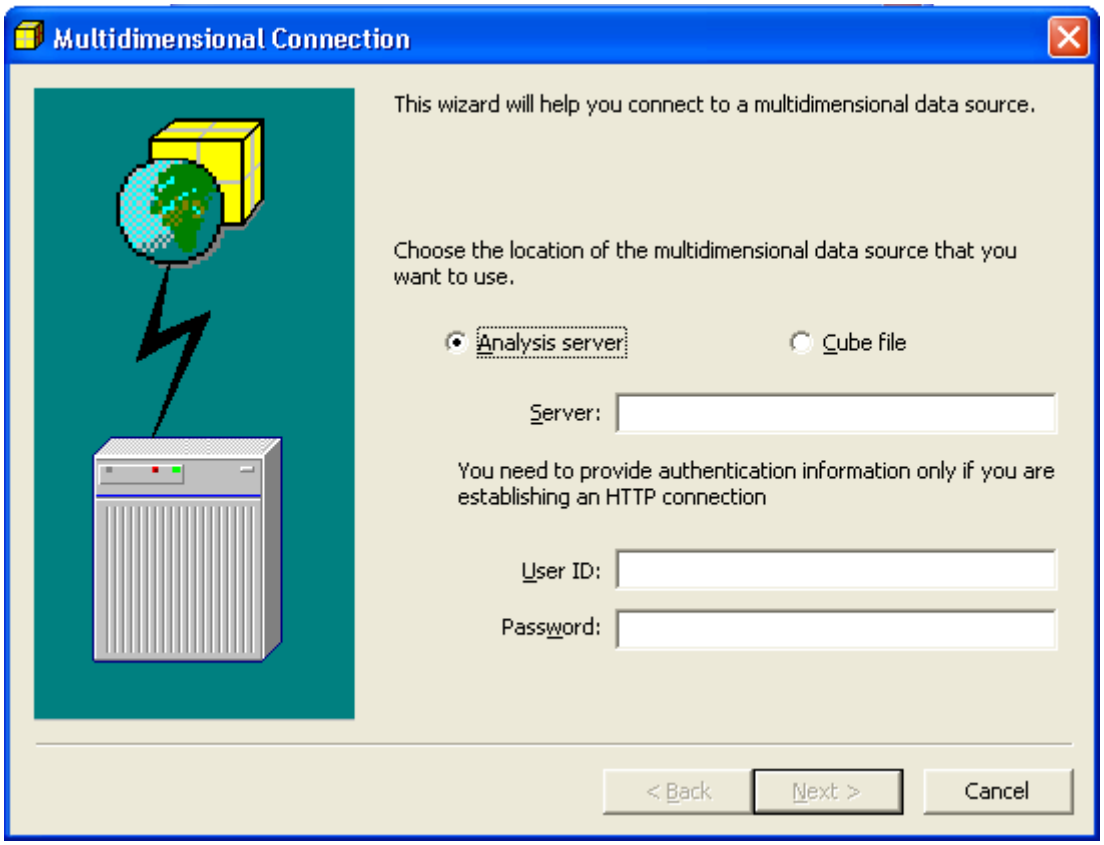
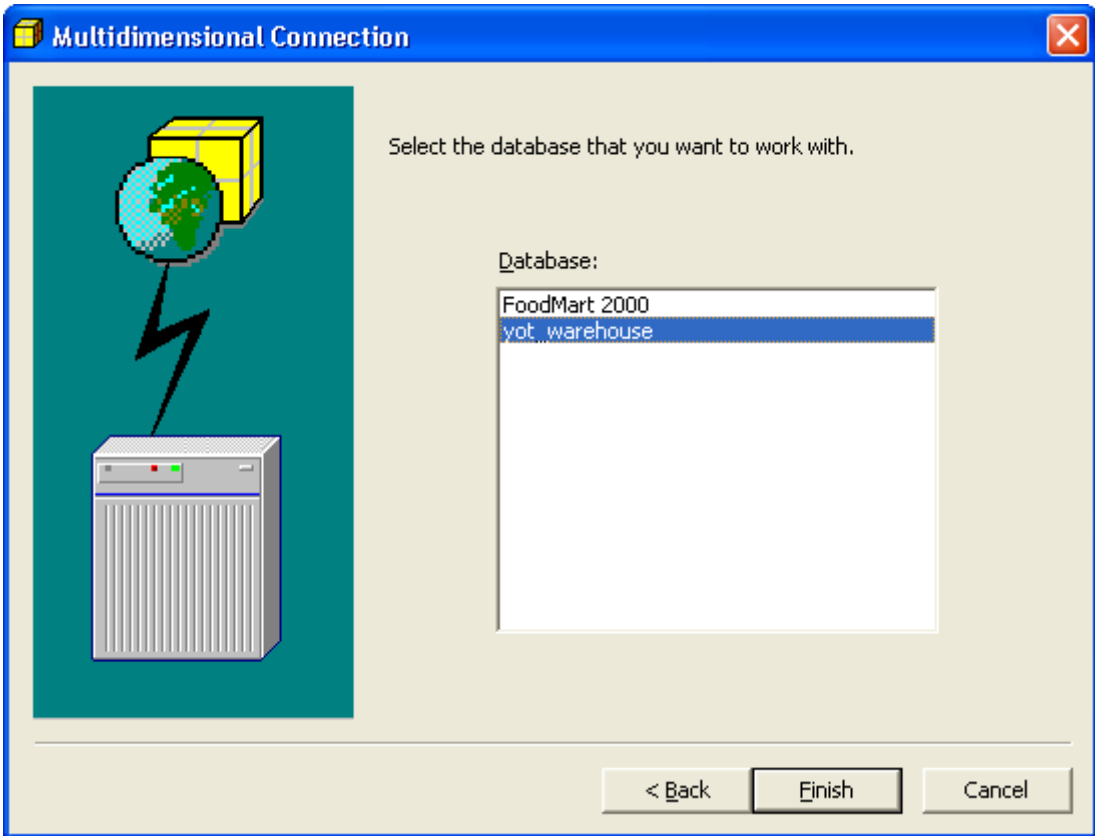
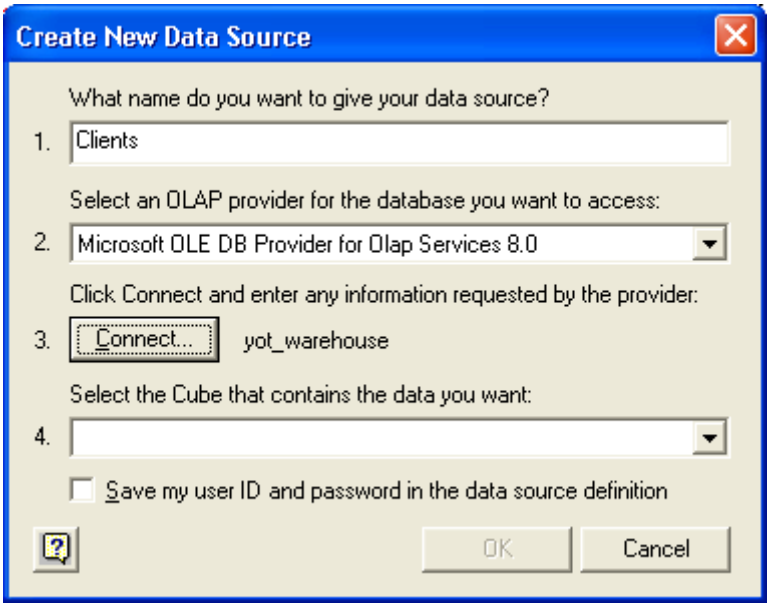

Multidimensional Connection
This wizard will help you connect to a multidimensional data source.
Choose the location of the multidimensional data source that you want to use.
Analysis server
Cube file
Server:
You need to provide authentication information only if you are establishing an HTTP connection
User ID:
Password:
< Back
Next >
Cancel

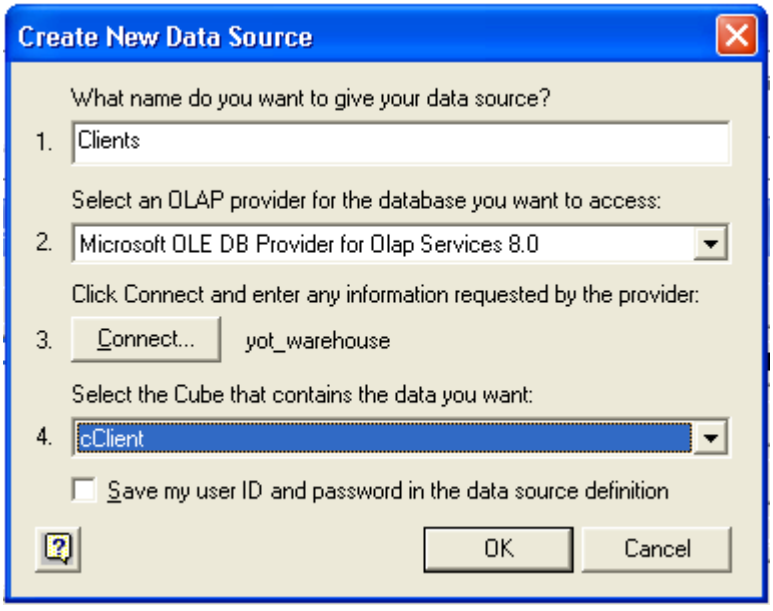
There is no need to enter userID/password. Authentication is done automatically based on your Windows logon. Click on Next.



From the list of warehouses available (there may be only 1) select the YotWarehouse, and click on 'Finish'. This will return you to the previous screen.


Create New Data Source
What name do you want to give your data source?
1. Clients
Select an OLAP provider for the database you want to access:
2. Microsoft OLE DB Provider for Olap Services 8.0
Click Connect and enter any information requested by the provider:
3. Connect... yot_warehouse
Select the Cube that contains the data you want:
4.
Save my user ID and password in the data source definition
OK
Cancel

Now you can select from the drop-down which cube you want to connect to, for example the client cube is cClient:


Create New Data Source
What name do you want to give your data source?
1. Clients
Select an OLAP provider for the database you want to access:
2. Microsoft OLE DB Provider for Olap Services 8.0
Click Connect and enter any information requested by the provider:
3. Connect... yot_warehouse
Select the Cube that contains the data you want:
4. cClient
Save my user ID and password in the data source definition
OK
Cancel

Click OK and now this connection will be available in your list of OLAP Cube Connections. As pointed out in the note earlier next time you want to connect to this cube, you will go straight from here:

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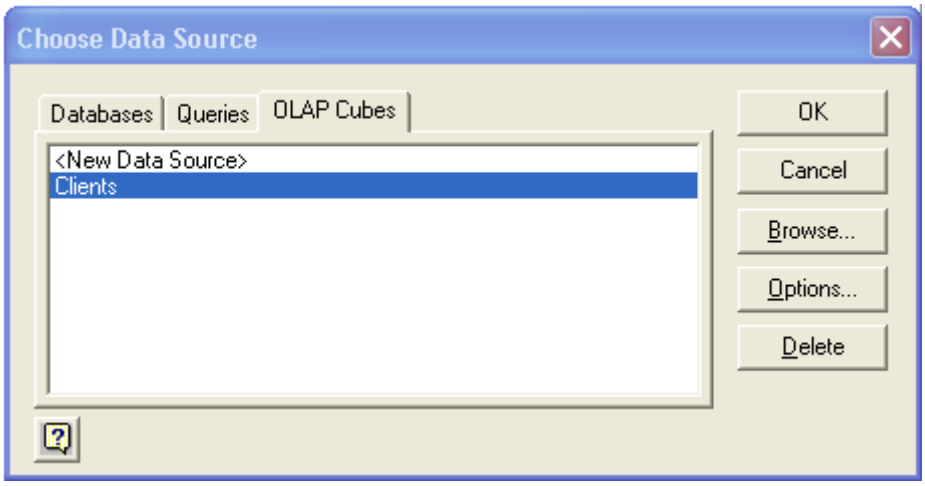
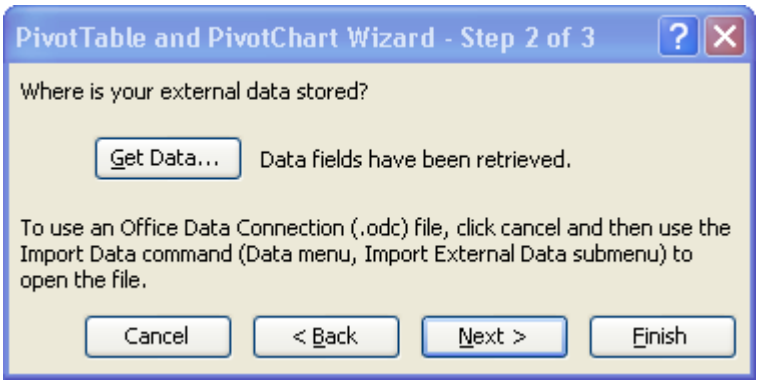
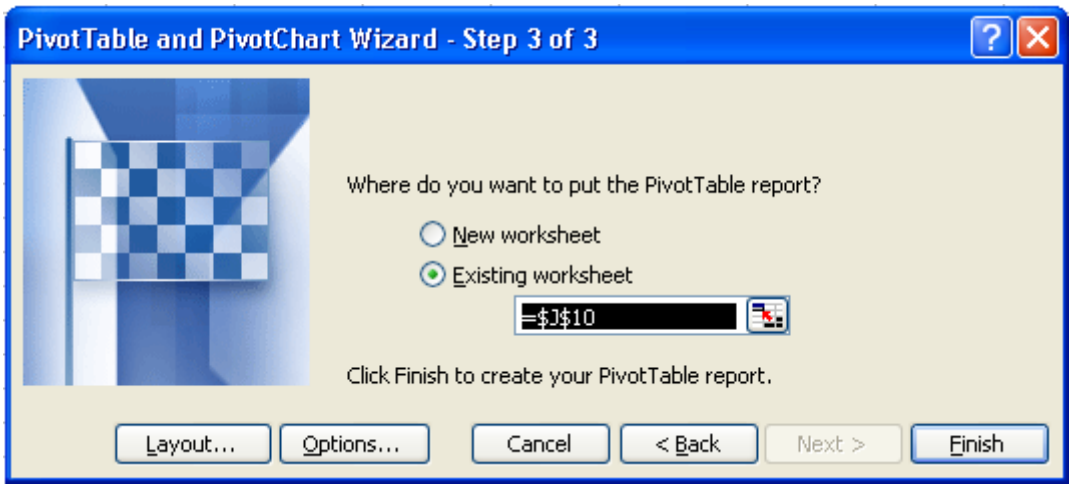


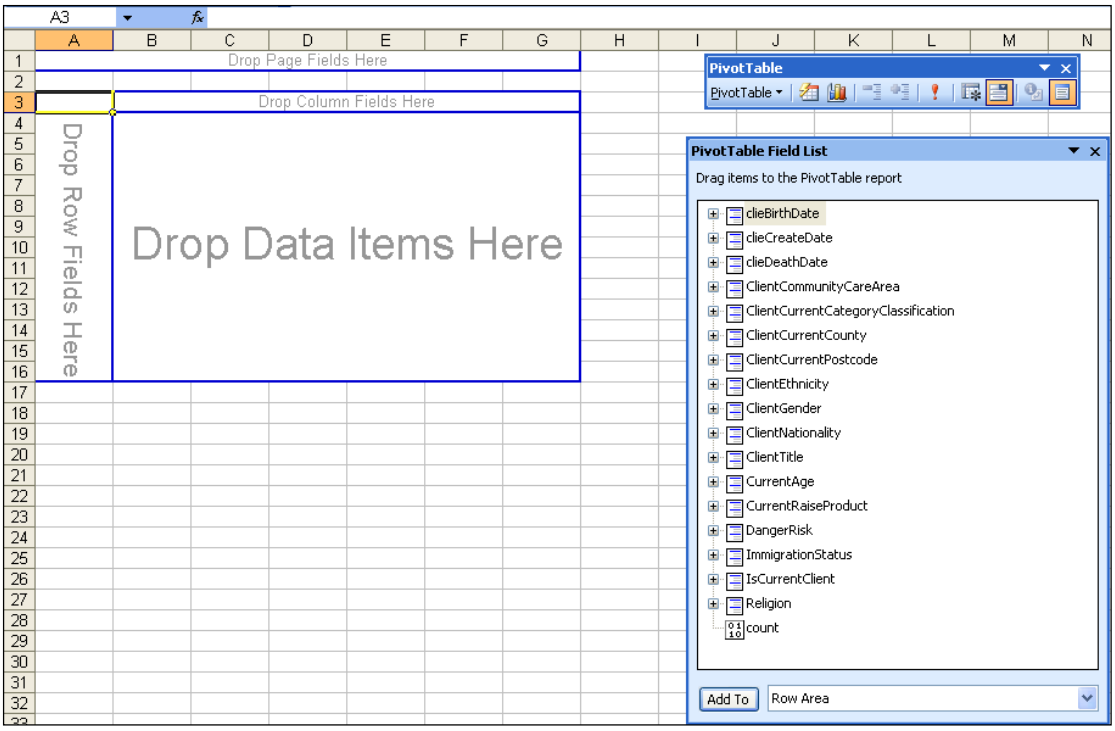
You click on OK will bring back to this screen:


PivotTable and PivotChart Wizard - Step 2 of 3
Where is your external data stored?
Get Data...
Data fields have been retrieved.
To use an Office Data Connection (.odc) file, click cancel and then use the Import Data command (Data menu, Import External Data submenu) to open the file.
Cancel
< Back
Next >
Finish

You will see a message telling you the data has been stored and clicking on 'Next' brings you to the next screen:



Decide where you want to position the table and then click on 'Finish'. This will bring you back to the worksheet:



Building a Pivot Table

Now you are ready to start to build a Pivot table. You will be presented with a layout in Excel similar to that shown above. You simply drag the items from the Pivot Table Field List onto the appropriate area of the Pivot table.

The items are either **dimensions** or **facts**.

Dimension tables contain reasonably static lists of data, which usually correspond to reference data used in the application. Reference data appears as a drop-down list in the CareDirector Youth application, such as “Ethnicity’ and “Reason for Referral’.

Fact tables record specific dynamic data about individual cases or clients. They typically consist of fields containing actual data and fields which reference back to dimension tables. For example the main client table consists of the Client Number, Name Fields, Address Fields etc., and also fields that link back to all the dimension tables that describe various attributes of the client such as Age, Ethnicity, Nationality, Gender etc. Typically a fact item will be a count.

There are 4 areas in the **Pivot table** of note.

1. Row Fields

This is the area where you drop fields from the list if you want to have one row per value of the dimension. For example if you want to have a table with number of clients, broken down by ethnicity, with one row per ethnicity value, drop the ethnicity dimension here:

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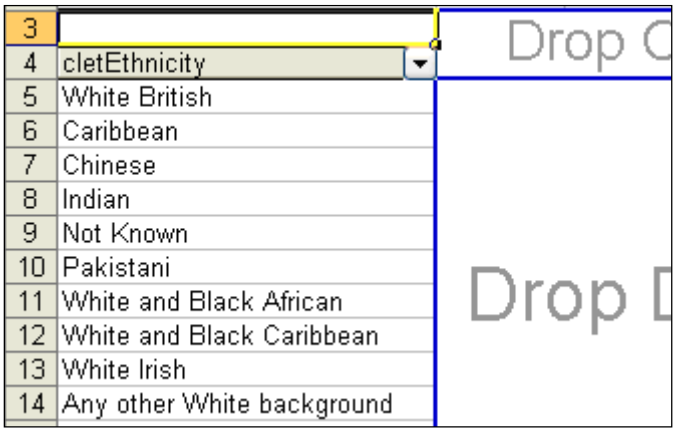
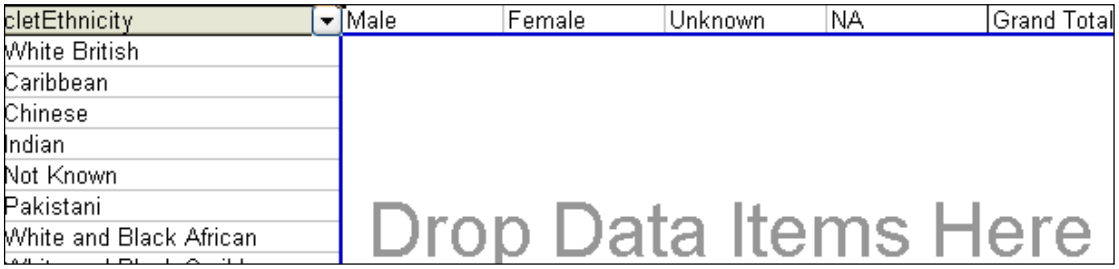


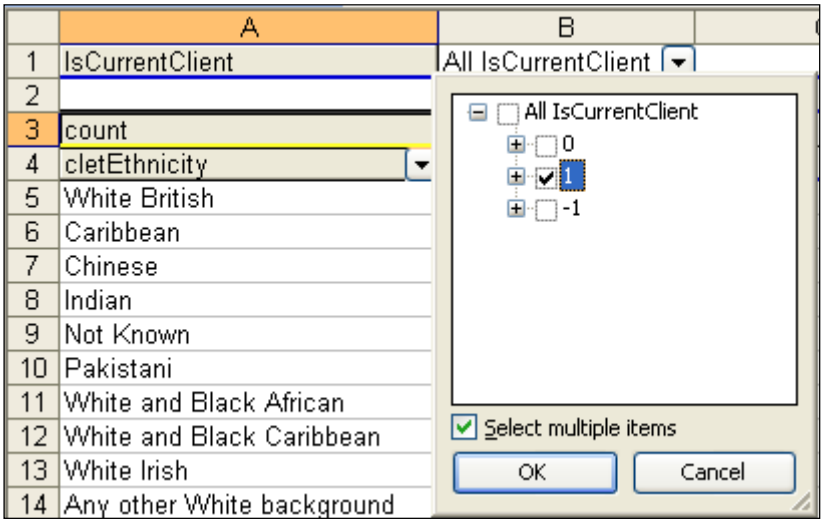
2. Column Fields

This is the area where you drop fields from the list if you want to have one column per value of the dimension. For example if you want to have a table with number of clients, broken down by Gender, with one column for Male, one column for Female drop the Gender dimension here:



3. Page Fields

This is the area where you drop any dimensions that you want to filter your data on. For example if you only want to include in your report clients who are current clients, drop the Current Client dimension here, then select the value '1' from the dimension:



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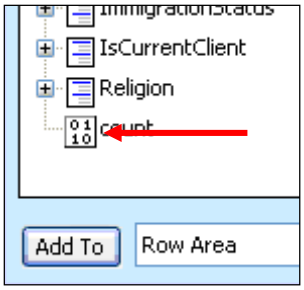
Note: You will often see the values of True and False which in a layperson's terms mean Yes and No. In addition you may see the numbers 0, 1 and -1 which can be translated as No, Yes and Not Applicable respectively. In the example above it means you are looking for current clients.

4. Data Items

This is where you place the actual fact(s) you want to view in your report. In many cases the cube will only contain one fact, which is a count, and this is the one you will have to use. In some cases the cube contains multiple facts, and you can choose one or more of these facts. The facts are identified in the field list by a symbol with **01/10**:



In this example after you have dragged and dropped the dimension and data items onto the sheet to produce a basic Client Table it will look like this:

	A	B	C	D	E	F
1	IsCurrentClient	1				
2						
3	count	clgeGender				
4	cletEthnicity	Male	Female	Unknown	NA	Grand Total
5	White British	5	1			6
6	Caribbean	1				1
7	Chinese		1			1
8	Indian	1				1
9	Not Known	1				1
10	Pakistani	1				1
11	White and Black African		1			1
12	White and Black Caribbean	1				1
13	White Irish		2			2
14	Any other White background	1				1
15	White and Asian	1				1
16	Any other Asian background	1	1			2
17	White	1	1			2
18	Mixed	1				1
19	Black or Black British	1	1			2
20	Chinese or Other Ethnic Group		1			1
21	African		1			1
22	Any other Black background	1				1
23	Any other ethnic group			1		1
24	Any other mixed background		1			1
25	Bangladeshi	1				1
26	NA				1	1
27	Grand Total	18	11	1	1	31

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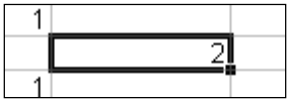
Verifying Data by Drilldown

You may look at the results of your query and want to check particular items. To do this you highlight the particular cell on the spreadsheet:



Then hold down the **Control, Shift and D** Keys. This will take you to the detail of the entries within a particular cell:

	A	B	C	D	E	F	G	H	I
1	clieKy	ccccClientCategoryClassification	ccccClientSecondaryClassification	ccccrefdata_id	ccccsubrefdata_id	curpProducts	curpChildrenFg	curpAdultsFg	curpYOTFg
2	5	NA	NA	0	0	YOT	FALSE	FALSE	1
3	61	NA	NA	0	0	YOT	FALSE	FALSE	1

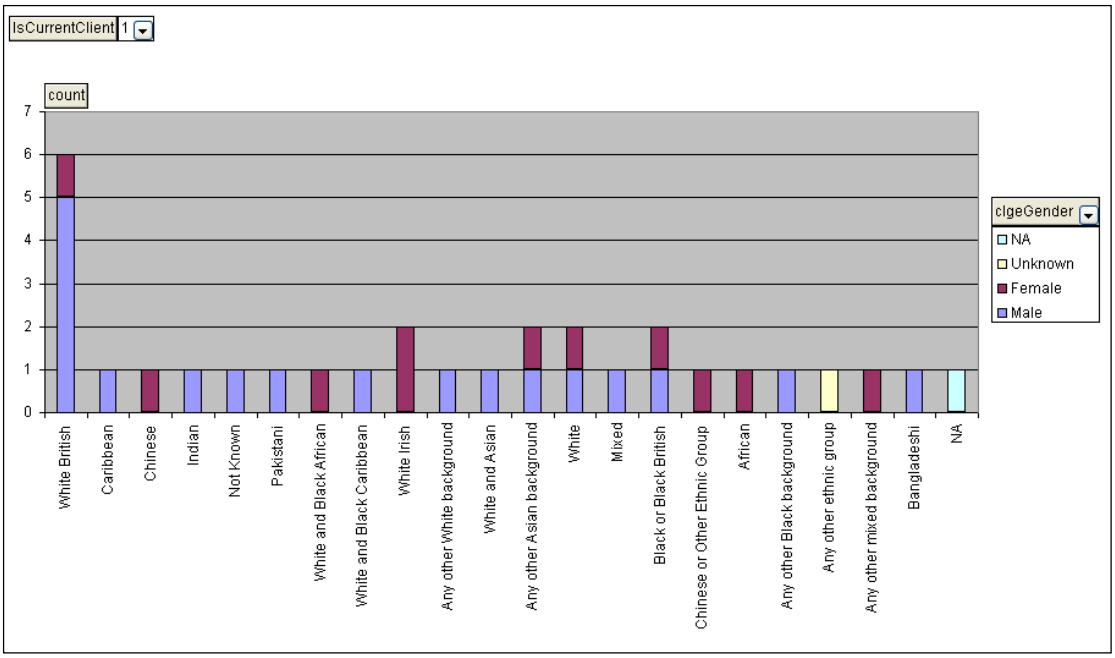
The drilldown contains a large amount of data so you may need to scroll to the left and ultimately select the columns you need. For example the names of the young persons who make up the count in the cell:

1	clieFirstName	clienMiddleName	clieSurname
2	Jessica		Fourth
3	Eileen		Twentyeight

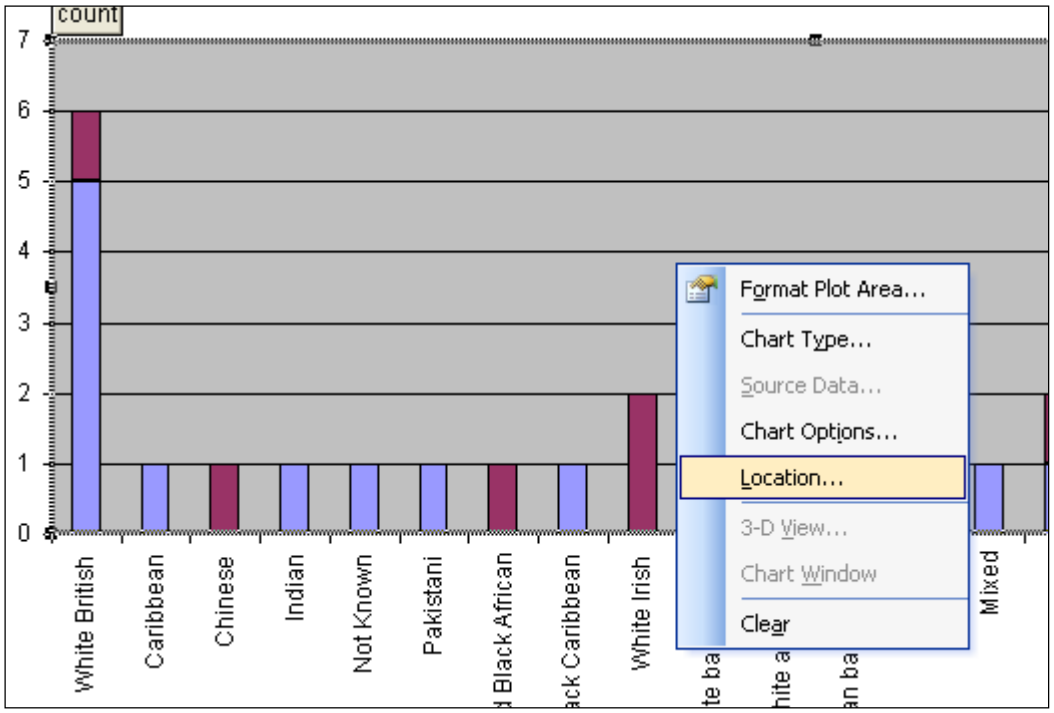
Creating a Chart from the Data

To produce a chart from this data, you click on the small chart icon, or if not visible, right-click anywhere within the Pivot table, and select Pivot Chart:

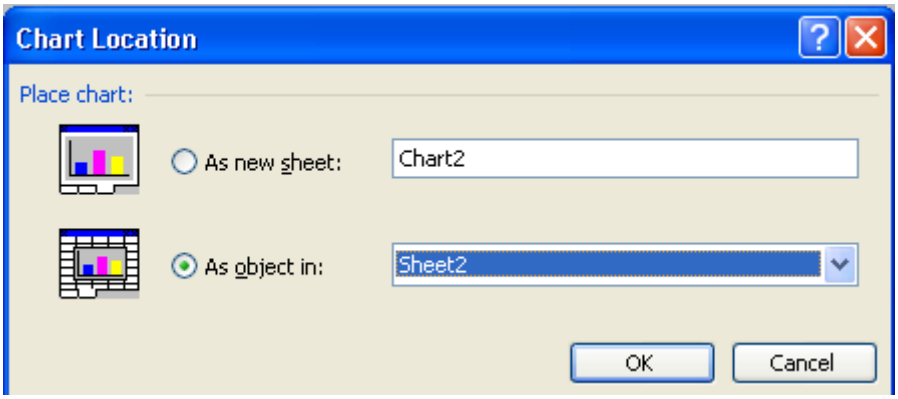
This will produce a new sheet with the chart located in it:



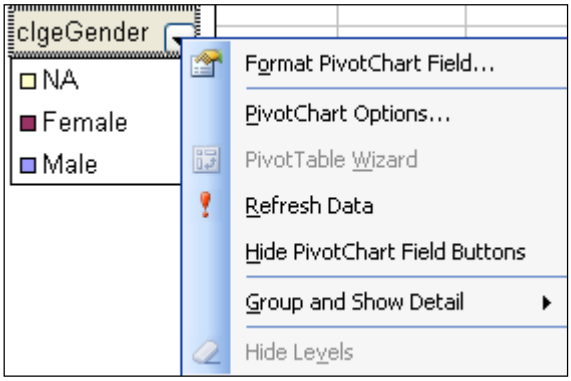
To move the chart back to the same sheet as the Pivot table, you need to right-click on the chart and select location:



Select “As object in” and select the required sheet from the drop-down List:



By default, the chart will contain dropdowns to alter selection, similar to those on the Pivot table itself. You can manipulate the chart either by using these, or by using the ones on the Pivot table. To remove them from the chart, right-click on one of the drop-downs and select "Hide PivotChart Field Buttons':



The chart is a standard Excel chart, and so the normal operations exist to change the chart type, layout etc.

Note: When a Pivot chart is refreshed, some formatting options on a chart may be lost, since Excel recreates the chart on refresh. To overcome this, you can record a macro that adjusts the formatting etc, and re-run this macro after refresh.

Adding Drill-through Functionality to Reports

In order for the drill-through functionality to function it requires a VBA macro to be part of the Excel workbook. There are 2 methods to achieve this:

1. To create your spreadsheet in a workbook that already has the macro.
2. To copy the macro from an existing workbook and paste into the new one.

To use an existing workbook, use the **yot_warehouse_template.xls** document, which is in the **careworks\yotwarehouse\reports** directory on your server or on your PC. This is an empty

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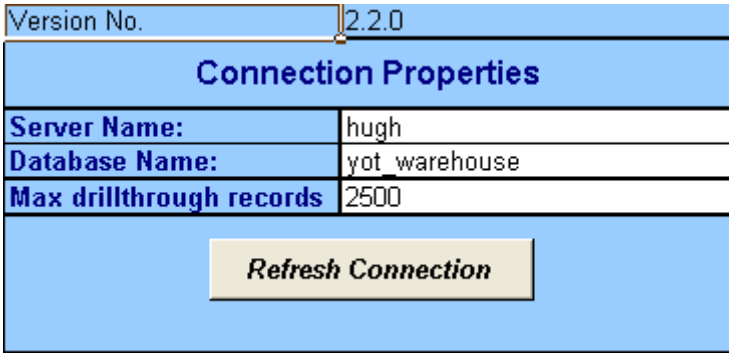
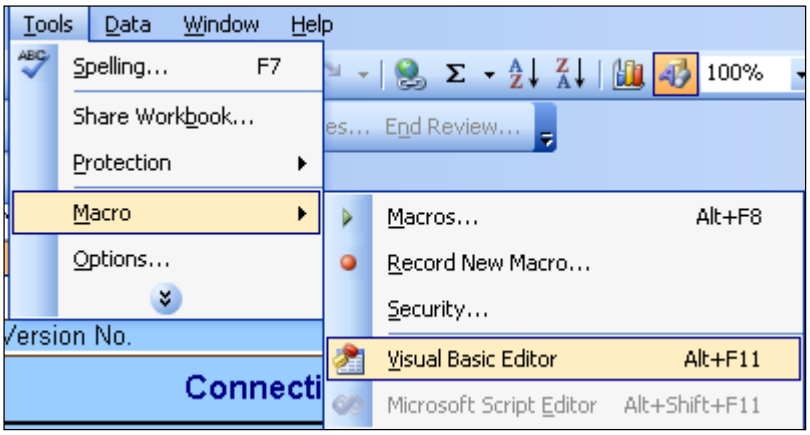
workbook which already contains the drill-through macro. The workbook contains a sheet called **config**:



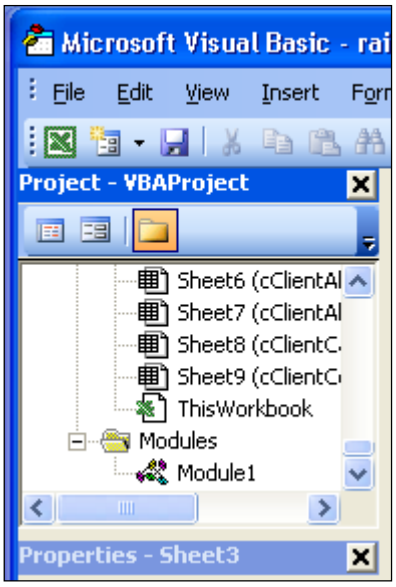
On this sheet there is a cell for entering the server name, and a Refresh button. This is used for modifying existing Pivot tables/charts to point them to a new server. This is not required when you create your own reports, but it is necessary to customise reports which were created against a different server originally, for example a spreadsheet from CareWorks, or from a different YOT.

If you have already created a workbook, and need to copy the macro, do the following:

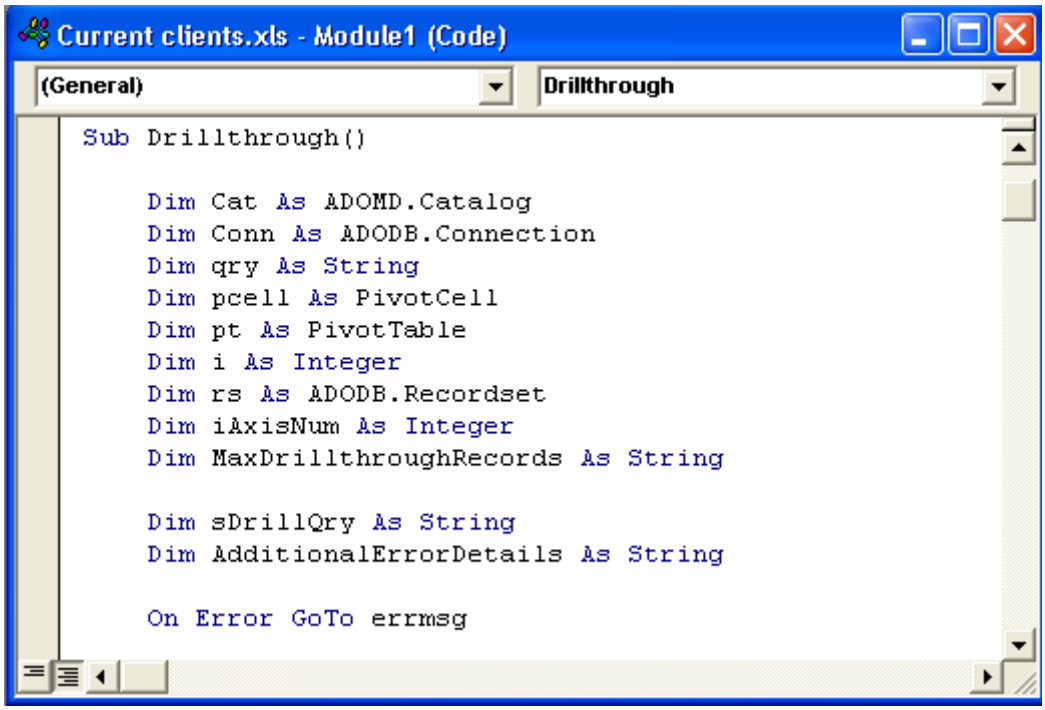
1. Open the yotwarehouse.xls spreadsheet. From the main menu, you select tools->macro->visual basic editor.



2. In the VB screen, on the left hand side, open the 'Modules' folder, and double-click Module 1.



3. In the Main Menu, you will now see the code for the macros.



Find the section beginning with

Sub Drillthrough()

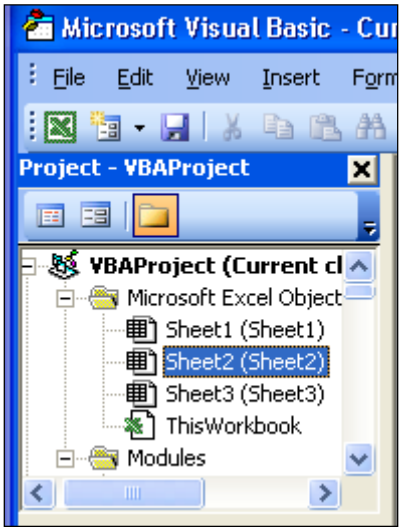
And ending with

End Sub

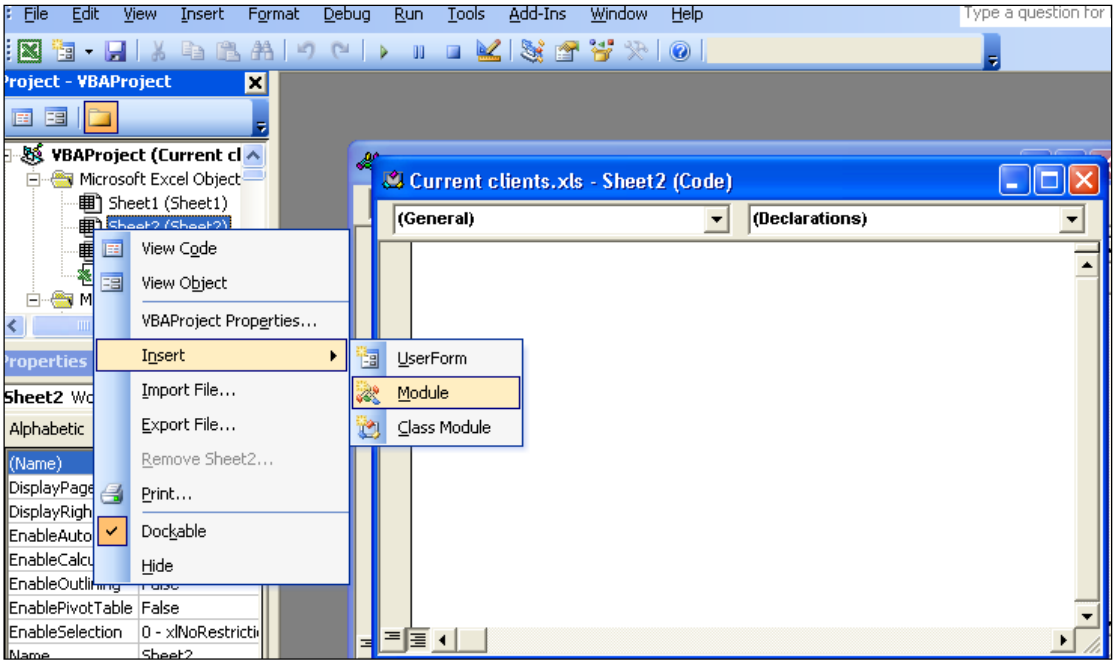
Copy this entire section.

To paste this into an existing spreadsheet, you need to do the following:

i Locate the target spreadsheet project on the left tree in VBA – it will be at the top level of the tree, as VBAProject(MySheet.xls).



ii Open this project and right-click on the Microsoft Excel Objects folder. Select Insert->Module:



iii This will create a new module called Module1. Simply paste the code into the main Window. Close the Window, and return to Excel.

iv To assign a hot key to a macro (e.g. CTL-ALT-D) select Tools->Macro->Macros from the Main Menu in Excel. In the Window that pops up, find the macro you are interested in:

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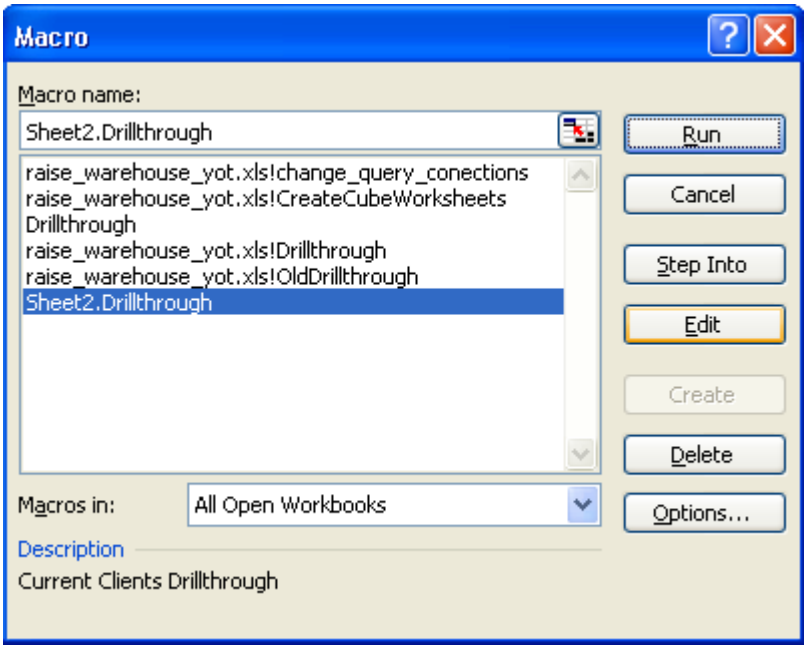
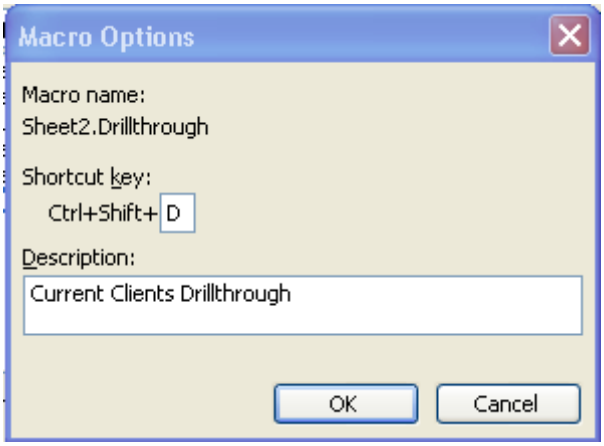


Note: Be careful, if you have multiple workbooks open, you will see the macros from all workbooks listed here, make sure that you select the correct one. Macros from other workbooks will have the workbook name in front of them.

v Click on Options to enter the Shortcut key:



vi You simply enter the letter you want, Excel will automatically decide whether you need to add CTL and/or SHIFT, depending on whether other combinations are already used or not. Click OK.

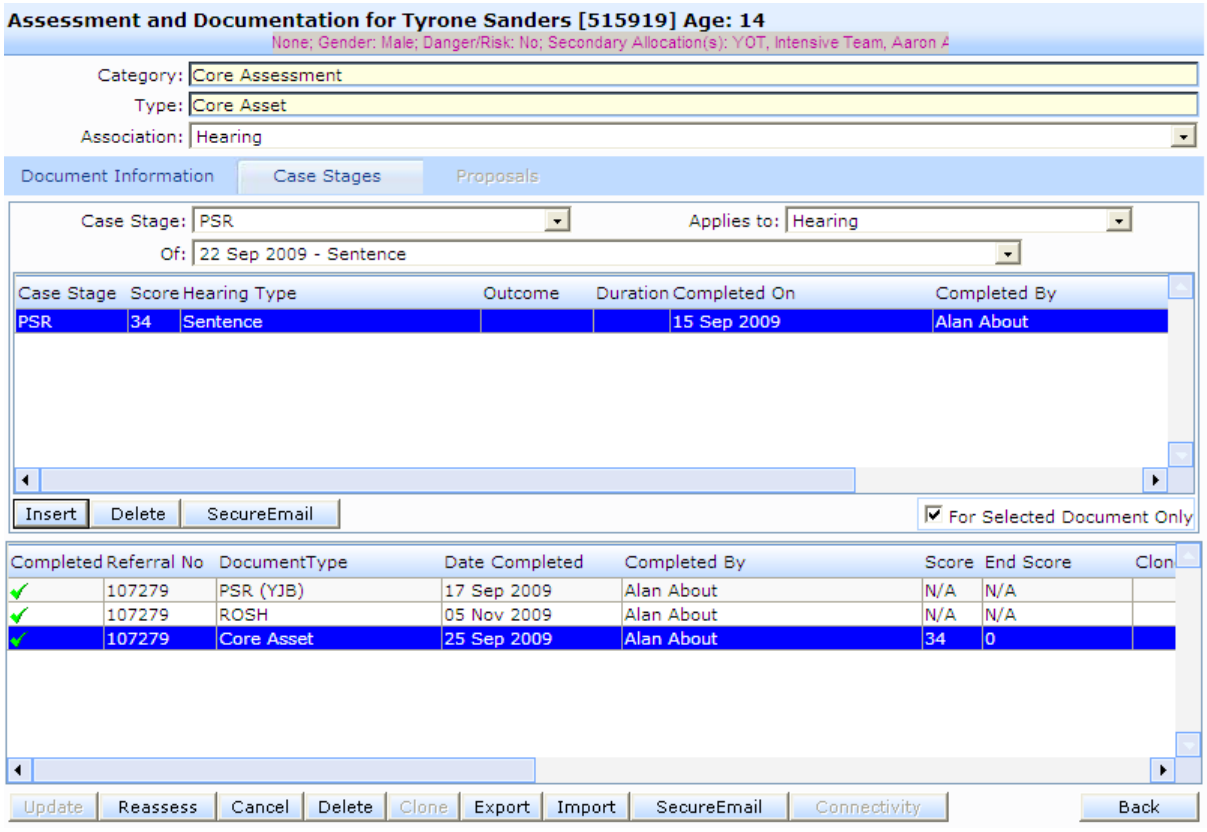
Chapter 21) Youth Justice: Scaled Approach

This session describes how the CareWorks application incorporates the Scaled Approach and the introduction of the Youth Rehabilitation Order (YRO).

At the end of this session delegates will be familiar with:

- Recording a Pre-Sentence Report (PSR) proposal of a YRO with related requirements
- Recording an Outcome of a YRO with related requirements
- Maintaining a YRO Programme with related requirements and interventions
- Recording Contacts that are associated with a YRO and certain requirements
- Using the Scaled Approach module to automatically assess and manually over-ride Intervention levels
- Having an overview of the calculations performed 'behind the scenes' to generate Levels of Intervention

The Core Asset completed for the PSR should be completed as usual, and a case stage of PSR recorded in the Case Stage tab, as shown below:


Assessment and Documentation for Tyrone Sanders [515919] Age: 14
None; Gender: Male; Danger/Risk: No; Secondary Allocation(s): YOT, Intensive Team, Aaron A
Category: Core Assessment
Type: Core Asset
Association: Hearing
Document Information
Case Stages
Proposals
Case Stage: PSR
Applies to: Hearing
Of: 22 Sep 2009 - Sentence
Case Stage Score Hearing Type Outcome Duration Completed On Completed By
PSR 34 Sentence 15 Sep 2009 Alan About
Insert
Delete
SecureEmail
For Selected Document Only
Completed Referral No DocumentType Date Completed Completed By Score End Score Clon
107279 PSR (YJB) 17 Sep 2009 Alan About N/A N/A
107279 ROSH 05 Nov 2009 Alan About N/A N/A
107279 Core Asset 25 Sep 2009 Alan About 34 0
Update
Reassess
Cancel
Delete
Clone
Export
Import
SecureEmail
Connectivity
Back

Note:Where there are multiple offences with the same gravity score, the offence with a scaled approach intervention level is the primary index offence in the Asset document.

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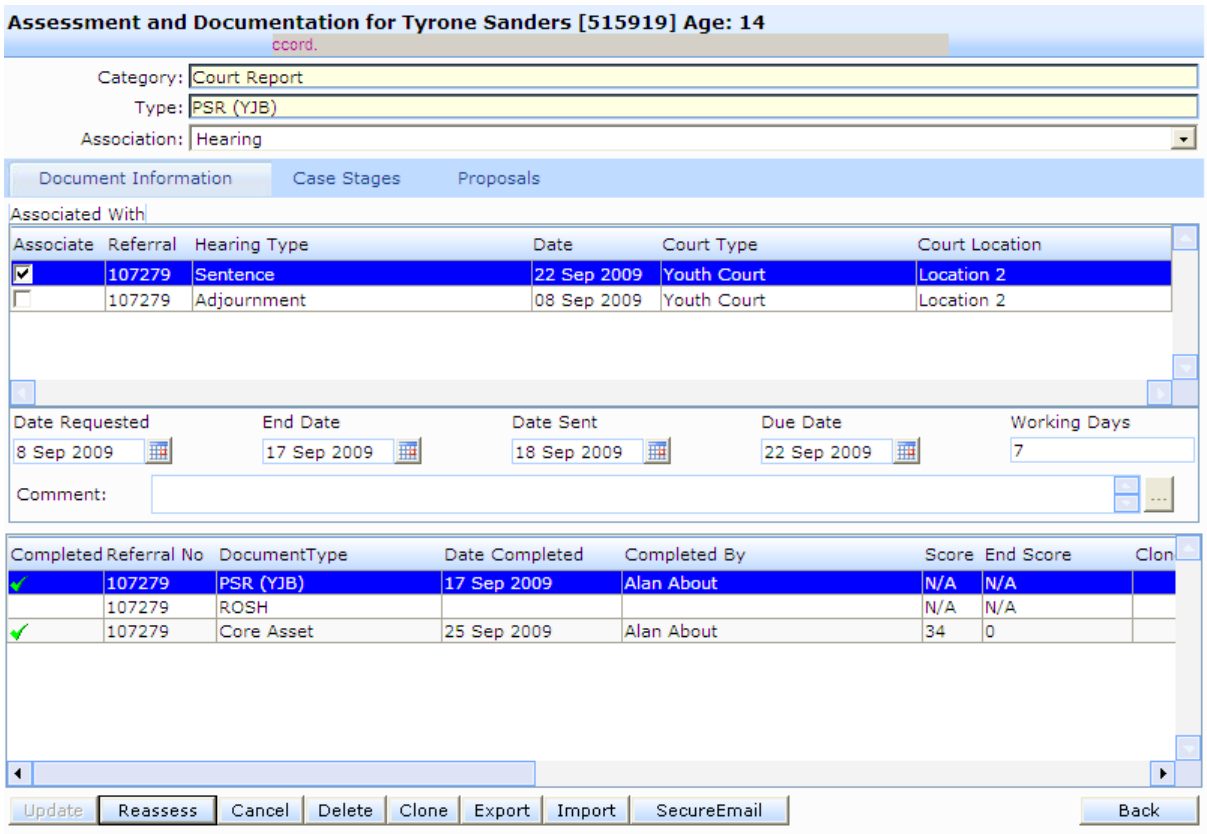
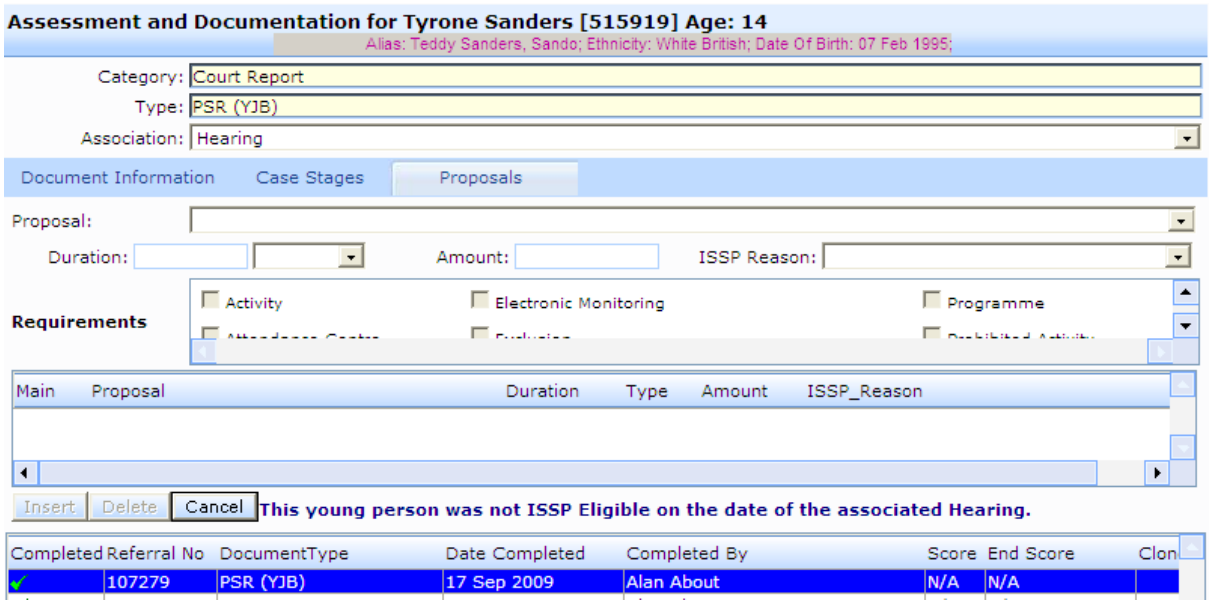
The PSR Report document is also completed as normal, within the Assessments and Documentation module of the relevant client record.

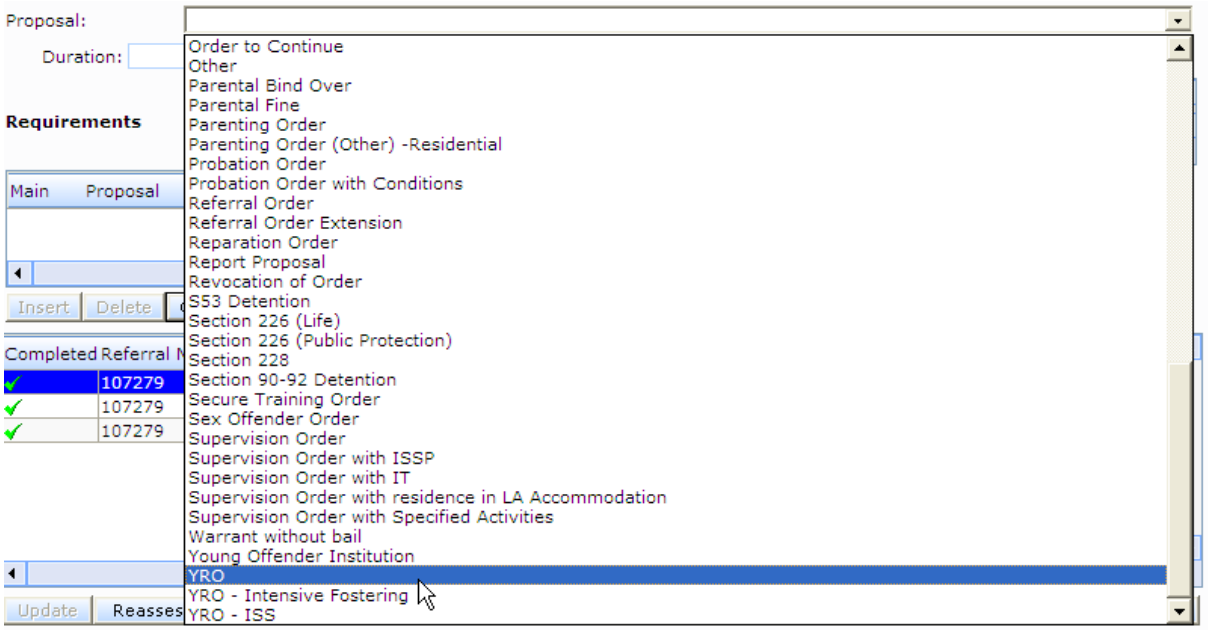
The PSR should still be associated to the relevant sentence hearing upon creation, and the dates pertaining to the PSR (Requested, End, Sent and Due) should also be entered as usual, and as shown below:


Assessment and Documentation for Tyrone Sanders [515919] Age: 14
Category: Court Report
Type: PSR (YJB)
Association: Hearing
Document Information
Case Stages
Proposals
Associated With
Associate Referral Hearing Type Date Court Type Court Location
107279 Sentence 22 Sep 2009 Youth Court Location 2
107279 Adjournment 08 Sep 2009 Youth Court Location 2
Date Requested End Date Date Sent Due Date Working Days
8 Sep 2009 17 Sep 2009 18 Sep 2009 22 Sep 2009 7
Comment:
Completed Referral No DocumentType Date Completed Completed By Score End Score
107279 PSR (YJB) 17 Sep 2009 Alan About N/A N/A
107279 ROSH N/A N/A
107279 Core Asset 25 Sep 2009 Alan About 34 0
Update
Reassess
Cancel
Delete
Clone
Export
Import
SecureEmail
Back

Upon completion of the PSR Report, the **Proposal tab** is used to record the suitable YRO proposal, which composes of the proposed YRO type, and also the proposed related requirements.



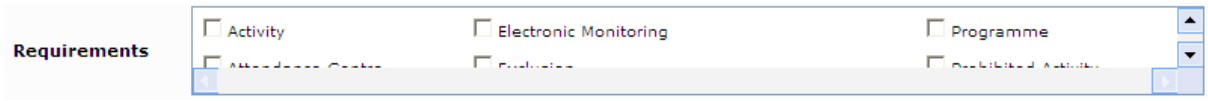
The **Proposal** drop down list contains the different YRO types of YRO, YRO - Intensive Fostering and YRO - ISS:



The **Duration** is entered as usual.

The **Requirements** section of the screen remains disabled until one of the YRO types have been selected within the Proposal field. The Requirements tick boxes then becomes enabled for use.

All 16 potential requirements are listed in the requirements section of the proposal screen, viewable by using the scroll arrows to the right hand side:



Multiple requirements can be selected by ticking the corresponding check boxes. Potential requirements are:

- Activity
- Attendance Centre
- Curfew
- Drug Testing
- Drug Treatment
- Education
- Electronic Monitoring
- Exclusion
- Intoxicating Substance Treatment
- Local Authority Residence

Note: Reparation does not feature as a potential Requirement in its own right.

YJB have confirmed that where **Reparation** is proposed for or imposed upon the young person, it should be included as part of an **Activity** requirement.

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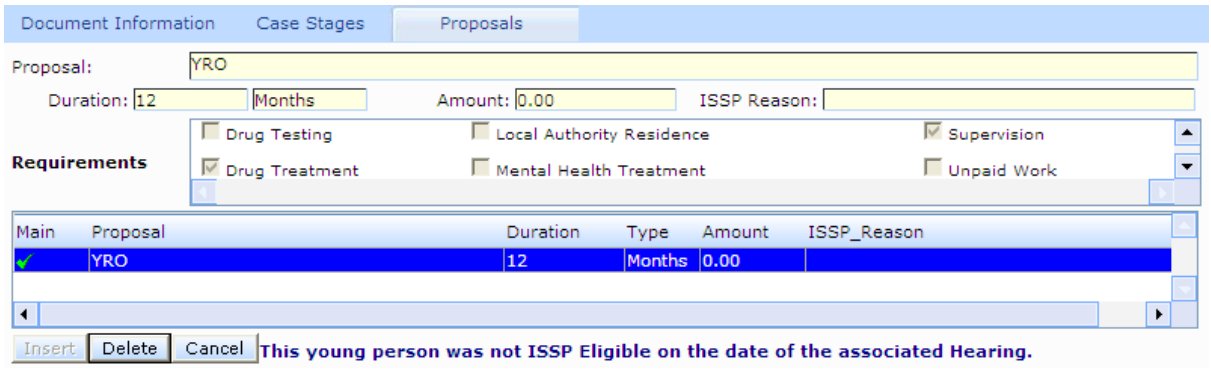
- Mental Health Treatment
- Programme
- Prohibited Activity
- Residence
- Supervision
- Unpaid Work

Clicking the Insert button then stores the proposal in the list and disables the Requirements check boxes. As usual, the first proposal entered is classed (and recorded) as the main outcome. Subsequent proposals can be recorded if required/relevant.



The type of proposal is displayed in the grid listing, and the related requirements can be viewed by single clicking to highlight the proposal in the grid listing. The requirements selected for the proposal are then displayed as ticked in the top portion of the proposal screen.

YRO Outcomes

Recording the Outcome and Requirements

Once an YRO sentence has been passed at court, the sentence hearing is recorded as usual.

The Court **Outcome Type** is selected as usual, along with the relevant hearing from the drop down list.

The **TICs** (Taken into Consideration), **Duration** and **Comments** are entered as usual, and the **Main Outcome** and related **Offences** check boxes ticked:

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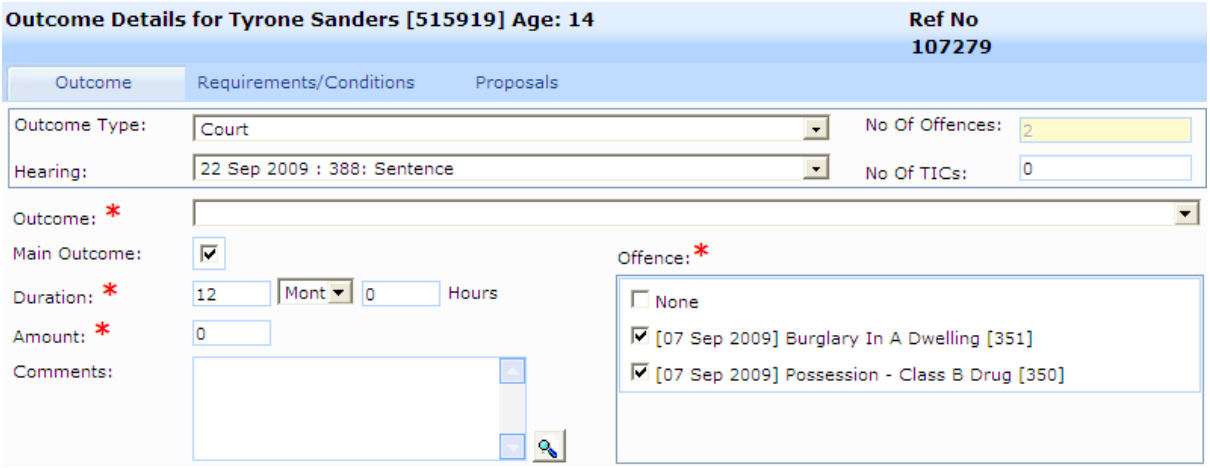
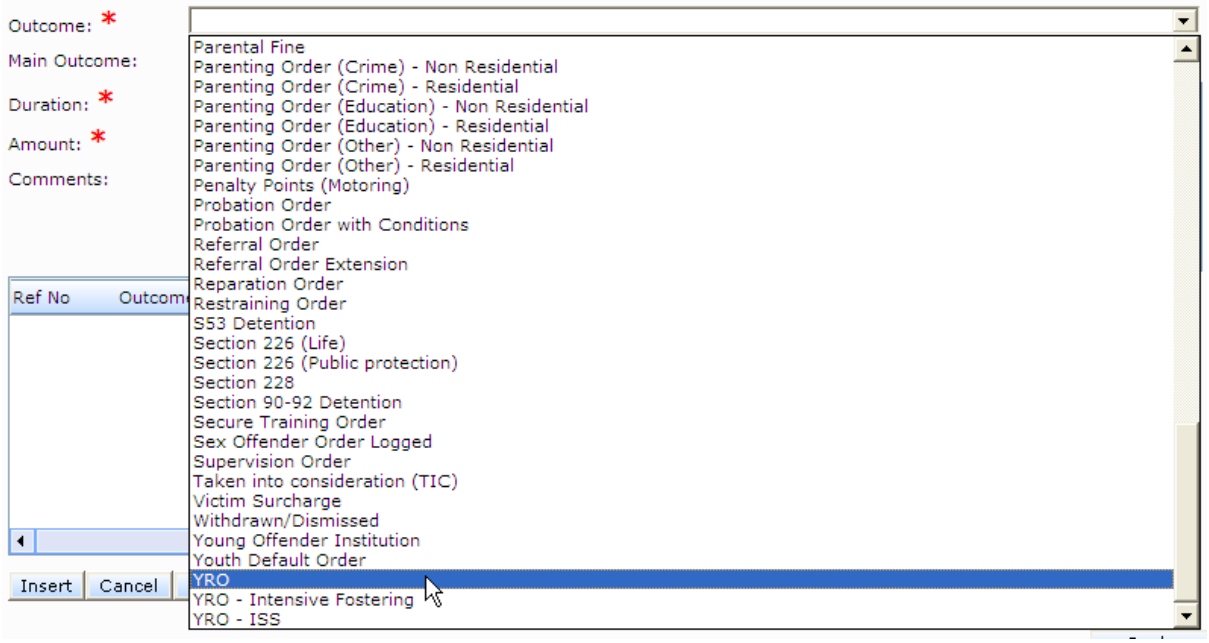
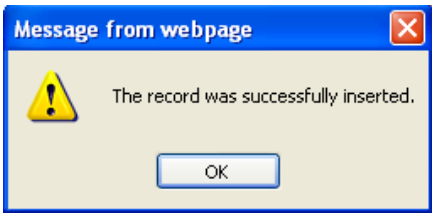


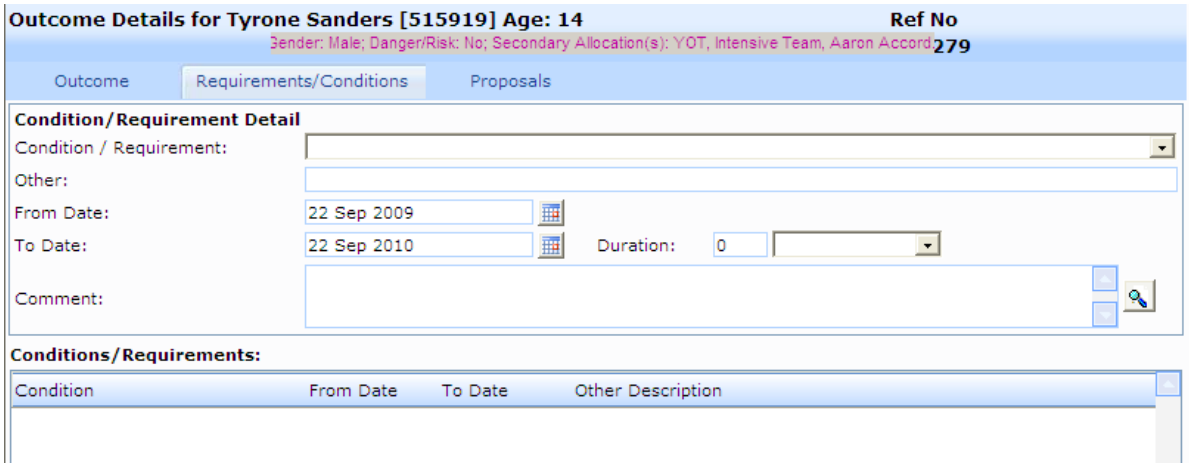
The three YRO types are listed in the **Outcome** drop down list:



Once all the information is entered and the Insert button is clicked, a confirmation message displays as shown here.

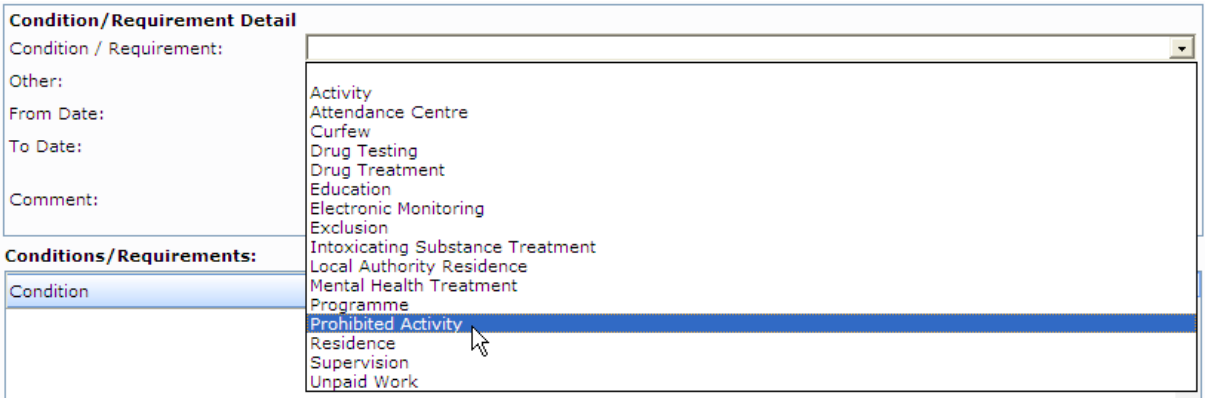


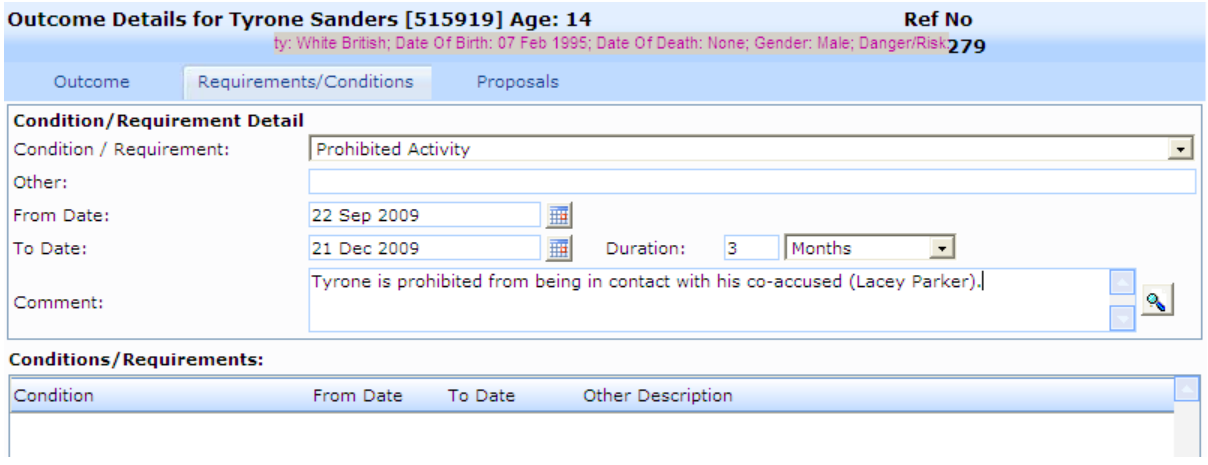
On clicking the OK button, the user is redirected automatically to the Outcomes **Requirements/Conditions** tab as shown below:



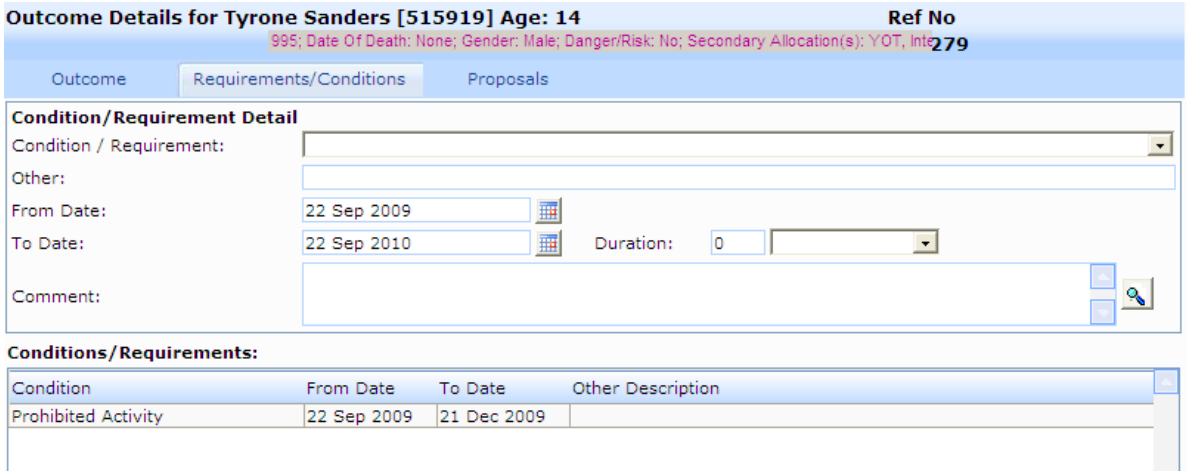
The **From Date** automatically defaults to the Start Date of the YRO, according to the date of the Outcome entered. The **To Date** defaults to the End Date of the YRO, according to an automatic calculation performed using the Outcome Date and Duration entered. These dates can be manually over-written to the dates that are relevant to the particular requirement being recorded. The **Duration** is manually entered also, and **Comments** relating to that requirement can also be added via free text.

As a type of YRO has been entered as the Outcome, the **Condition/Requirement** drop down list displays all those Requirements that are relevant to YROs (the same list displayed in the PSR Proposal screen):



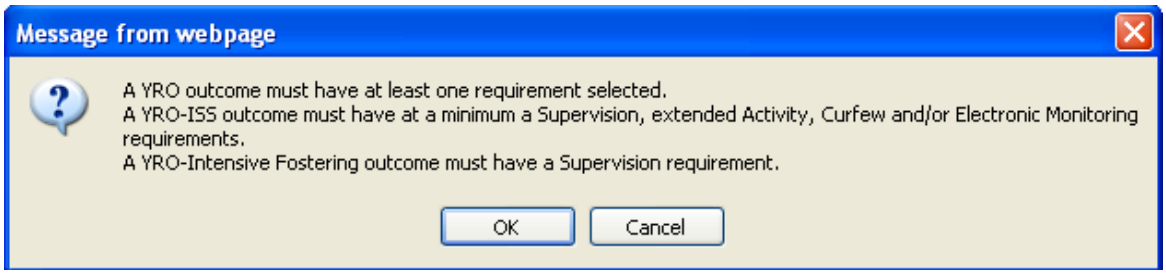


Once the **Requirement** information has been entered, clicking Insert saves the Requirement into the grid listing beneath, and returns the screen to the default setting (blanked fields, with the exception of the From and To Dates which return to the YRO Start and End Dates), ready for the next requirement to be recorded as relevant and added to the grid listing:



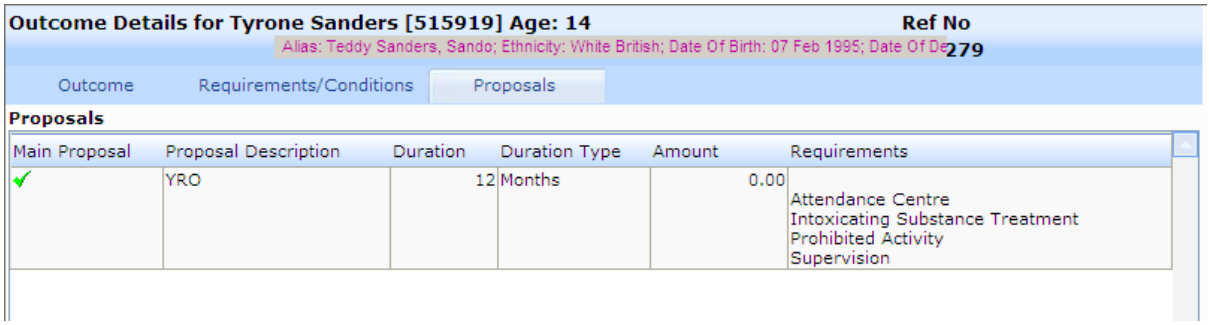
All information recorded against the requirement (including the comments) can be viewed in further grid columns by scrolling to the right hand side of the grid listing, or by single clicking the requirement in the grid listing to view the details in the top portion of the screen, where information can be edited if required and saved using the Update button.

Upon selecting the YRO outcome in the Outcome tab, the system runs a validation to check whether the minimum requirements have been recorded for the corresponding type of YRO. Upon clicking OK the user is automatically redirected to the Requirements/Conditions tab/screen.


Message from webpage
A YRO outcome must have at least one requirement selected.
A YRO-ISS outcome must have at a minimum a Supervision, extended Activity, Curfew and/or Electronic Monitoring requirements.
A YRO-Intensive Fostering outcome must have a Supervision requirement.
OK
Cancel

Proposals tab within the Outcomes module

The YRO proposal automatically displays within the **Proposals** tab in the YRO Outcome, as is the case with other Outcomes and their corresponding proposals.

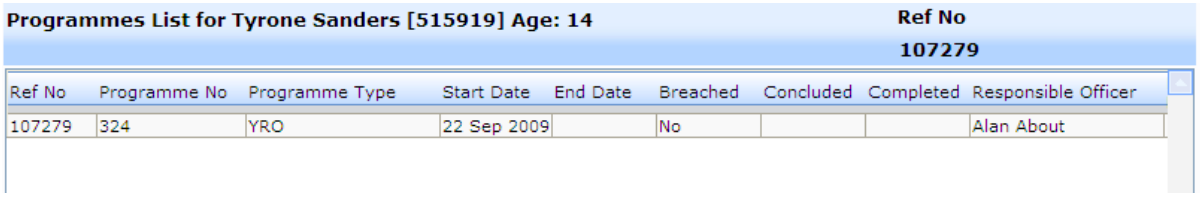


In addition to the description of the Outcome proposed and the recommended duration, the **Requirements** proposed in relation to the YRO are also displayed within this screen, to compare against the actual Outcome and Requirements imposed by the courts.

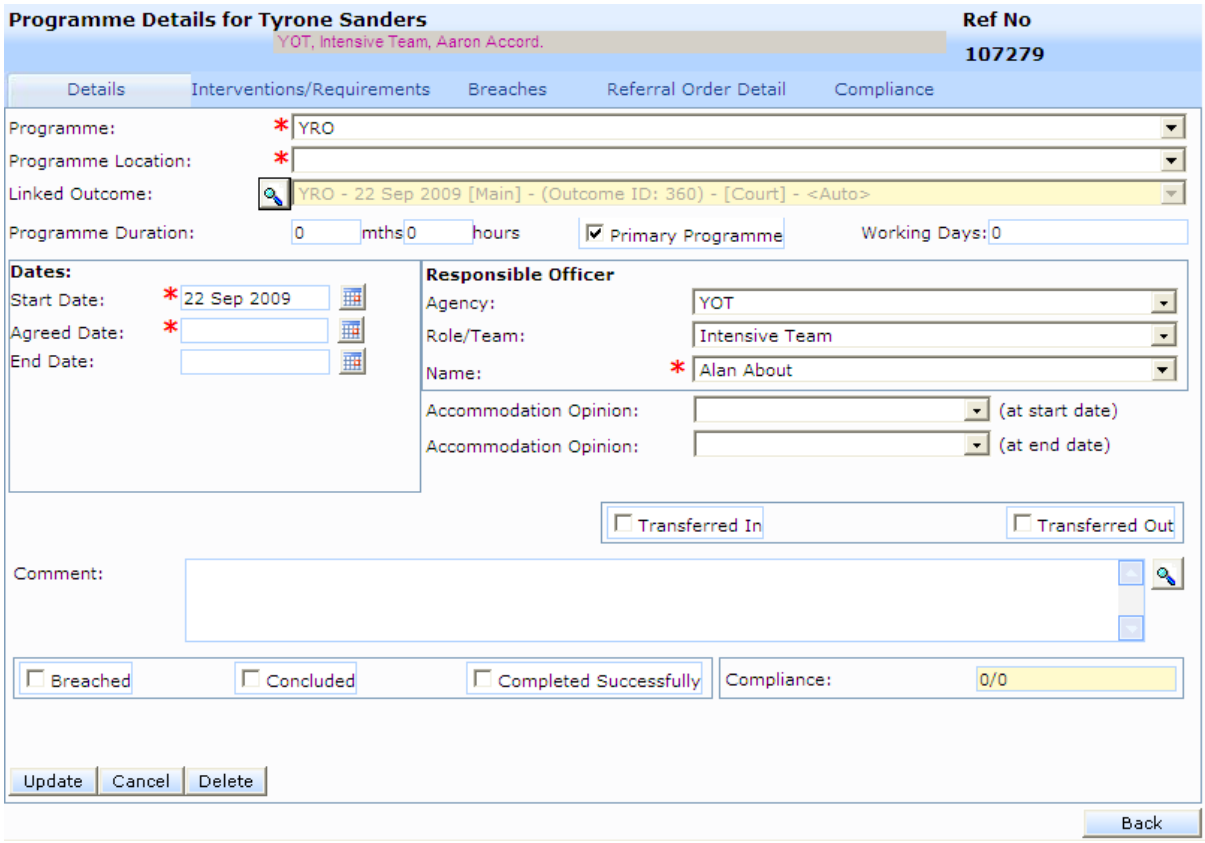
YRO Programmes

Recording the Programme

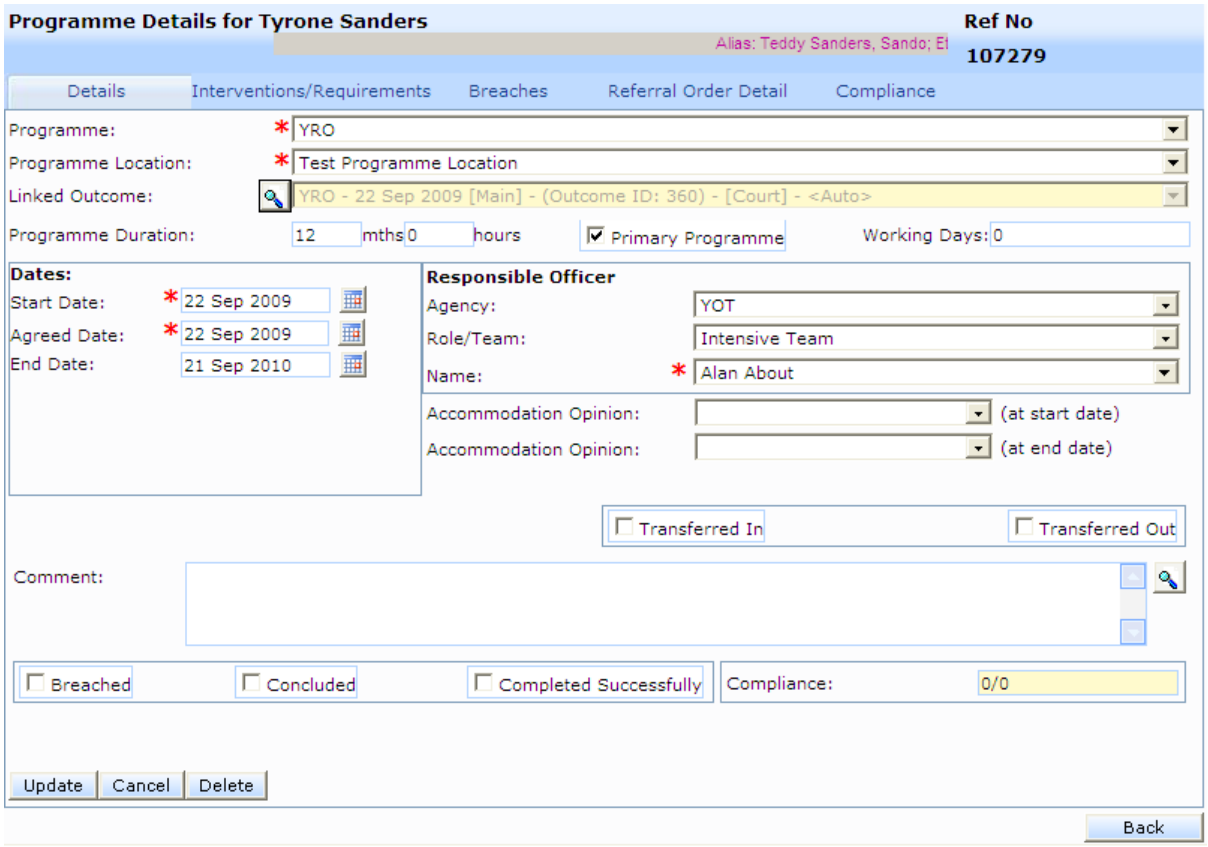
Once an YRO Outcome has been recorded against the client record, a **Programme** of the same type is automatically created against the client record also:



Upon viewing the automatically generated Programme, some details are already entered by default, as they are 'pulled through' from entries made within the Outcomes module:

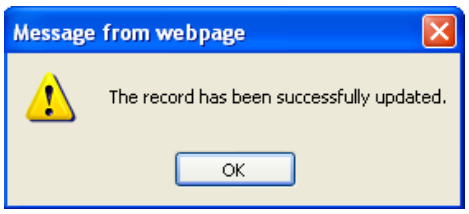


The user must complete the Programme details by ensuring the **Location**, **Duration** and **Agreed Date** are entered (automatically completing the **End Date** field) and click the Update button to save the details.



The **Responsible Officer** fields default to the logged in user who recorded the outcome, and require manual amendment to reflect the true worker responsible for the young person's order/programme.

Once the Programme has been updated, a confirmation message displays as shown



Recording the Requirements

Upon entering the **Intervention/Requirements** tab details are 'pulled through' automatically:

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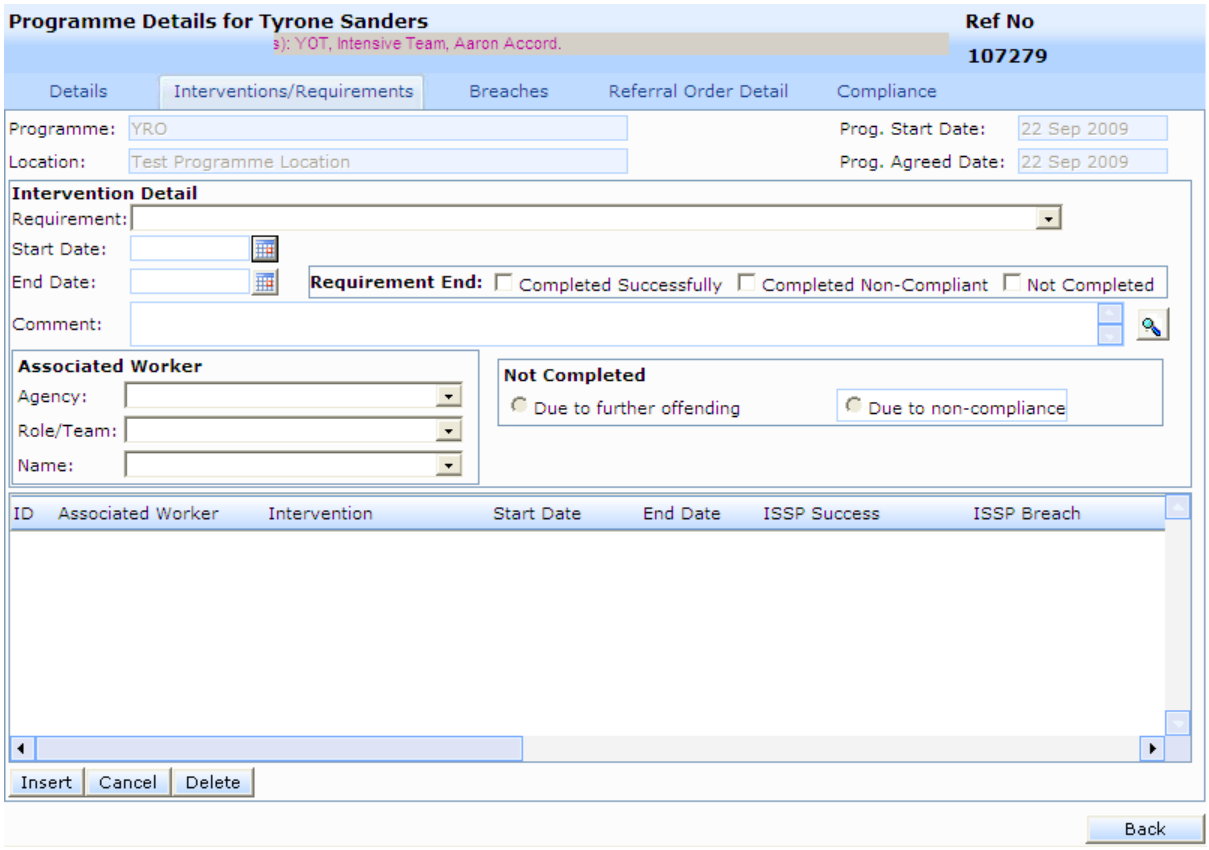
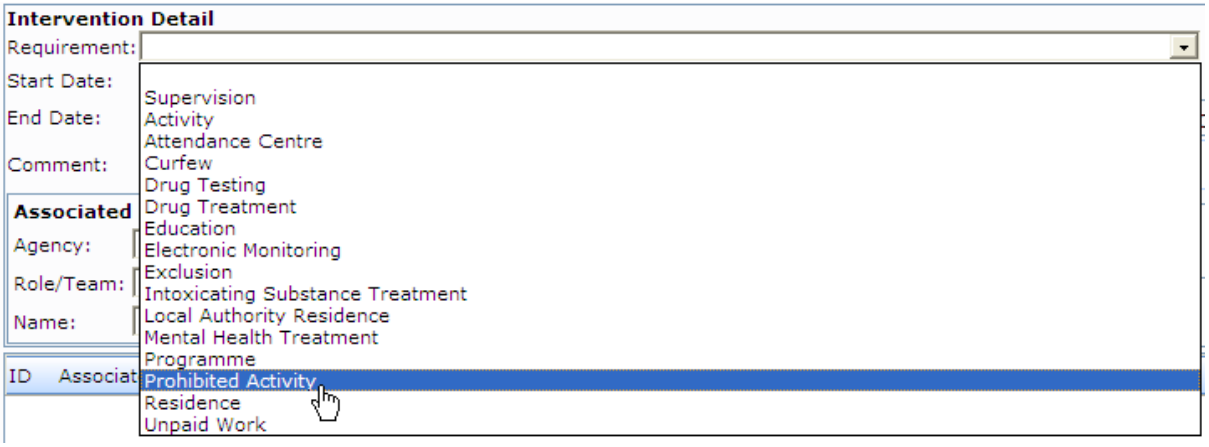


As the Programme is of an YRO type, the screen alters accordingly, to display a **Requirements** field (rather than an Intervention drop down list as with other Programme Types), which lists all the potential Requirements relevant to YROs:



The **Start Date** and **End Date** for the requirement are entered manually.

Free text **Comments** relating to the requirement can also be recorded.

The worker responsible for this particular requirement is recorded in the **Associated Worker** drop down list fields.

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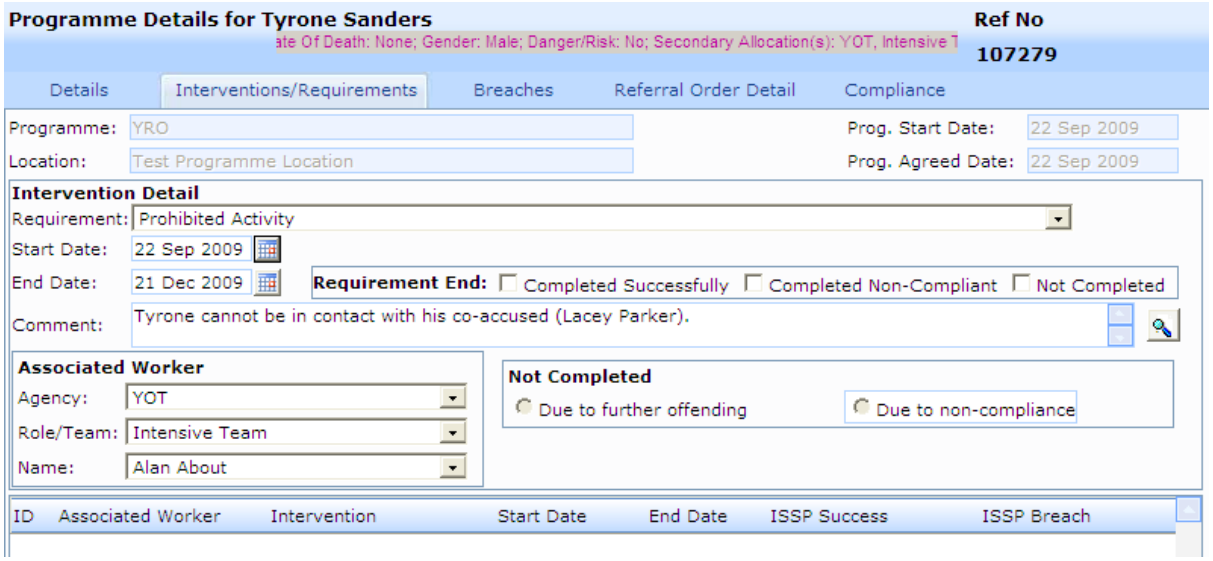


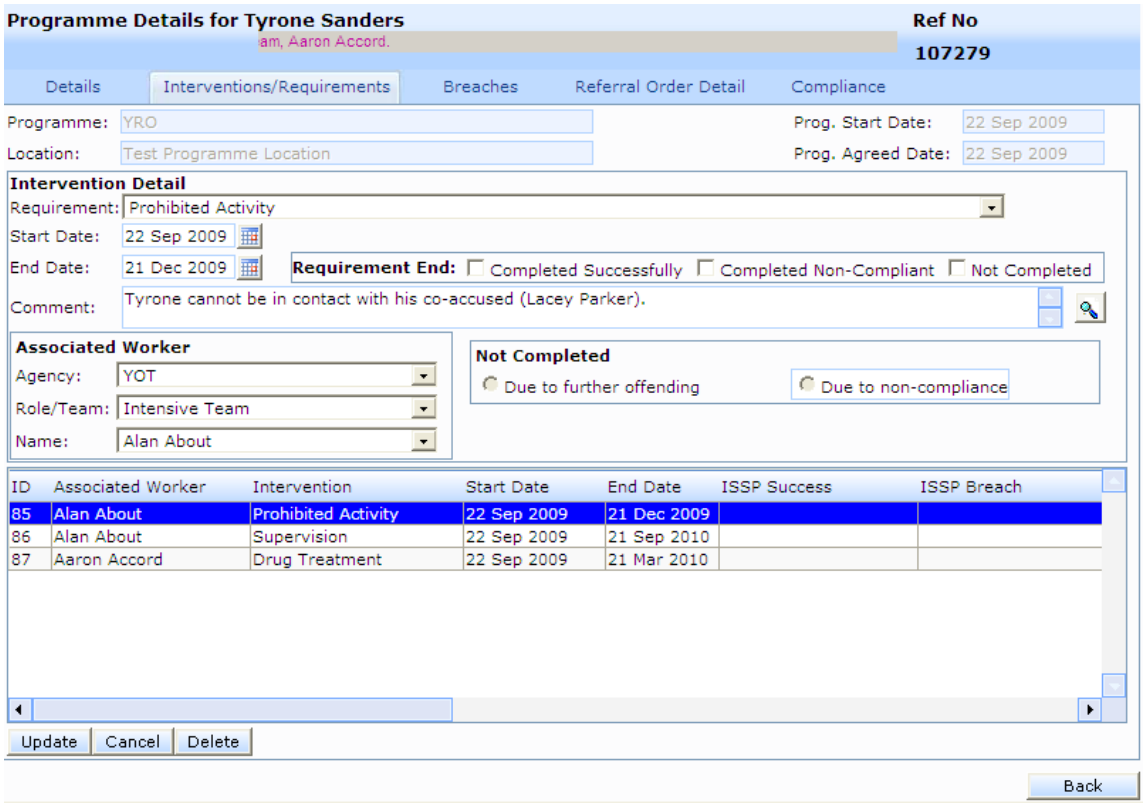
Clicking the Insert button then saves the Requirement to the grid listing beneath, and blanks the Intervention Detail and Associated Worker fields, ready for the next Requirement to be recorded as required.

As the Programme is of an YRO type, alterations to the screen also incorporates a **Requirement End** section and a **Not Completed** section in relation that relate to each individual requirement recorded.

YRO Contacts

Recording Completion of Requirements and the YRO

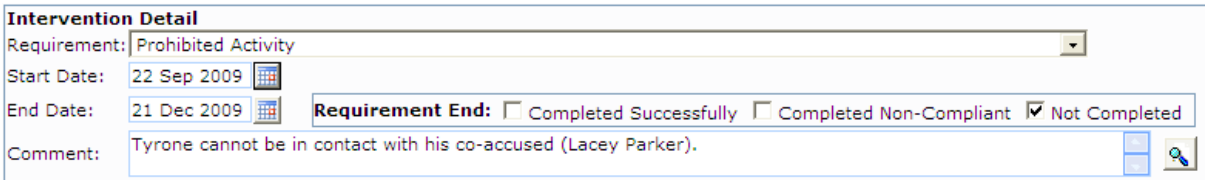
As Requirements come to an end, for whatever reason, this must be recorded.


Programme Details for Tyrone Sanders
am, Aaron Accord.
Ref No
107279
Details
Interventions/Requirements
Breaches
Referral Order Detail
Compliance
Programme: YRO
Location: Test Programme Location
Prog. Start Date: 22 Sep 2009
Prog. Agreed Date: 22 Sep 2009
Intervention Detail
Requirement: Prohibited Activity
Start Date: 22 Sep 2009
End Date: 21 Dec 2009
Requirement End: Completed Successfully Completed Non-Compliant Not Completed
Comment: Tyrone cannot be in contact with his co-accused (Lacey Parker).
Associated Worker
Agency: YOT
Role/Team: Intensive Team
Name: Alan About
Not Completed
Due to further offending
Due to non-compliance
ID Associated Worker Intervention Start Date End Date ISSP Success ISSP Breach
85 Alan About Prohibited Activity 22 Sep 2009 21 Dec 2009
86 Alan About Supervision 22 Sep 2009 21 Sep 2010
87 Aaron Accord Drug Treatment 22 Sep 2009 21 Mar 2010
Update
Cancel
Delete
Back

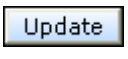
As each Requirement ends, a responsible worker must re-visit the Programme **Interventions/Requirements** tab within the YRO programme, and select the relevant **Requirement** from the grid listing by single clicking, as shown above.

The **Start Date** and the **End Date** of the Requirement should be updated if necessary to reflect the actual dates that the requirement started and finished.

If the requirement was **Completed** the worker must indicate whether the young person completed successfully or was non-compliant.


Intervention Detail
Requirement: Prohibited Activity
Start Date: 22 Sep 2009
End Date: 21 Dec 2009
Requirement End: Completed Successfully Completed Non-Compliant Not Completed
Comment: Tyrone cannot be in contact with his co-accused (Lacey Parker).

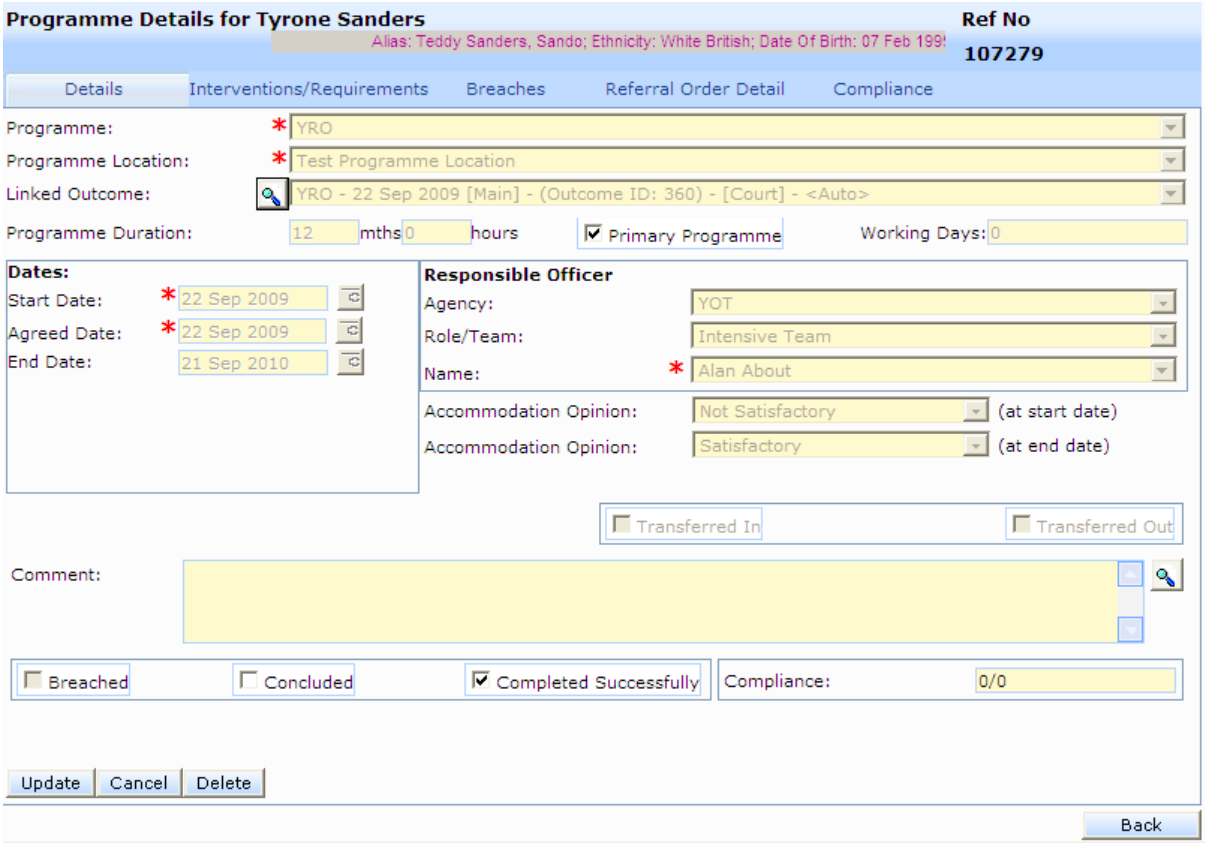
If the requirement was **Not Completed**, ticking the corresponding check box then enables the Not Completed section of the screen. The worker must select the most relevant reason for the requirement not being completed:

Clicking the 

button then saves the changes made. This process is to be carried out as each requirement ends.

Breaches to the YRO are recorded as per breaches for other orders and use of the Programmes module Breaches tab is the same.

When the YRO programme itself comes to an end, a responsible worker must re-visit the Programme Details screen once all the requirements end details are recorded, to record the Programme closure details.



The Programme **Dates** should be amended if required to reflect the true dates. **Accommodation Opinions** must be recorded and the **Concluded** or **Completed Successfully** check box ticked, as is the case with other programme types.

Recording YRO Contacts

On entering a **Contact Details** screen for the young person, any YRO programme against the young person's record is displayed in the list of **Linked Programmes**.

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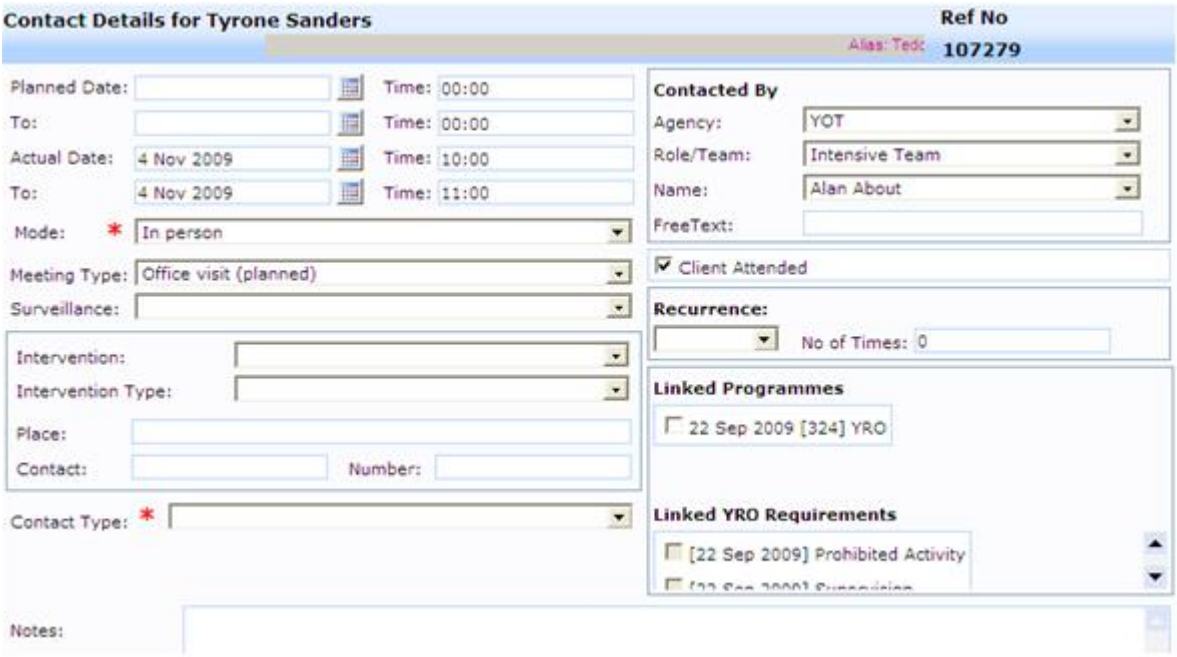
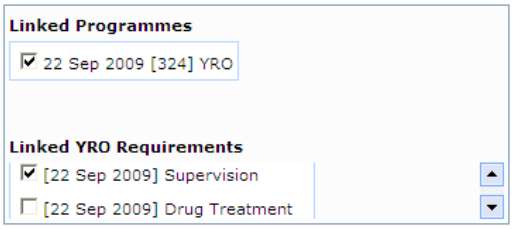


The **Requirements** recorded against the YRO are also displayed beneath. The list is disabled by default, and becomes enabled once the YRO Linked Programme has been ticked.

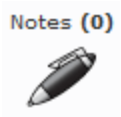


Multiple requirements can be viewed by using the scroll arrows to the right hand side.

The **Contact Type** determines if the contact counts towards the linked programme as either *Counts Towards Programme*, or *Does Not Count Towards Programme*.

Adding Notes to a Contact Record

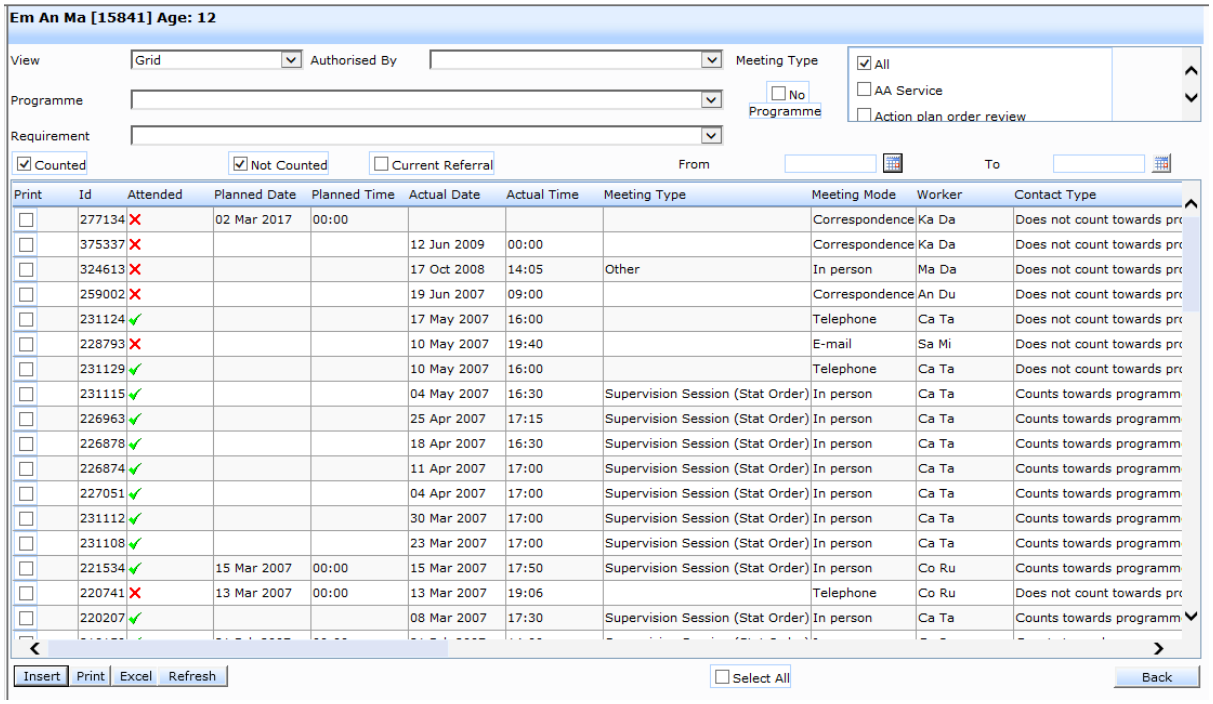
Notes added to a record are shown in the Notes free text field. The Notes button displays the number of notes added to a record. Click it to display the full notes added to a contact record.



Notes button

Searching for Contact Types

In the **Contacts Grid Listing** screen, filters have been added at the top of the screen, so that once a Programme type of YRO has been selected, any particular **Requirement** recorded against the YRO can be selected to filter all contacts linked to that particular Requirement:


Em An Ma [15841] Age: 12
View
Grid
Authorised By
Meeting Type
All
AA Service
Action plan order review
Programme
No Programme
Requirement
Counted
Not Counted
Current Referral
From
To
Print
Id
Attended
Planned Date
Planned Time
Actual Date
Actual Time
Meeting Type
Meeting Mode
Worker
Contact Type
277134 02 Mar 2017 00:00 Correspondence Ka Da Does not count towards pr
375337 12 Jun 2009 00:00 Correspondence Ka Da Does not count towards pr
324613 17 Oct 2008 14:05 Other In person Ma Da Does not count towards pr
259002 19 Jun 2007 09:00 Correspondence An Du Does not count towards pr
231124 17 May 2007 16:00 Telephone Ca Ta Does not count towards pr
228793 10 May 2007 19:40 E-mail Sa Mi Does not count towards pr
231129 10 May 2007 16:00 Telephone Ca Ta Does not count towards pr
231115 04 May 2007 16:30 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
226963 25 Apr 2007 17:15 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
226878 18 Apr 2007 16:30 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
226874 11 Apr 2007 17:00 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
227051 04 Apr 2007 17:00 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
231112 30 Mar 2007 17:00 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
231108 23 Mar 2007 17:00 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
221534 15 Mar 2007 00:00 15 Mar 2007 17:50 Supervision Session (Stat Order) In person Co Ru Counts towards programm
220741 13 Mar 2007 00:00 13 Mar 2007 19:06 Telephone Co Ru Does not count towards pr
220207 08 Mar 2007 17:30 Supervision Session (Stat Order) In person Ca Ta Counts towards programm
Insert
Print
Excel
Refresh
Select All
Back

All other **Contacts** and **Enforcement** functionality operates in the same way for YROs as for other orders and programme types.

If a client attended the scheduled contact, it is marked with a green check , if they did not attend, it is marked with a red cross .

Enforcement Records for Client's Missing Contacts

If a client misses a contact meeting and a contact record has been created with:

- An *Actual date*
- *Contact Type* of *Counts Towards Programme*
- A linked *Programme*
- And the *Client Attended* check box is NOT ticked

The system will generate a warning that a contact meeting has been missed and automatically navigates to an enforcement record.

Recording a Breach offence against a client

The enforcement record can be competed with the **Enforcement Action** of *Breach*.

Raise records an offence of *Breach* against the most recent referral which contains the *Programme* linked to the contact. The offence is the breach of a statutory order, of breach of order of licence conditions.

The *Offence On Date* is the date of the missed contact linked to the Enforcement record.

Printing All Contacts

You can selct all contact notes to be printed as a readable report.

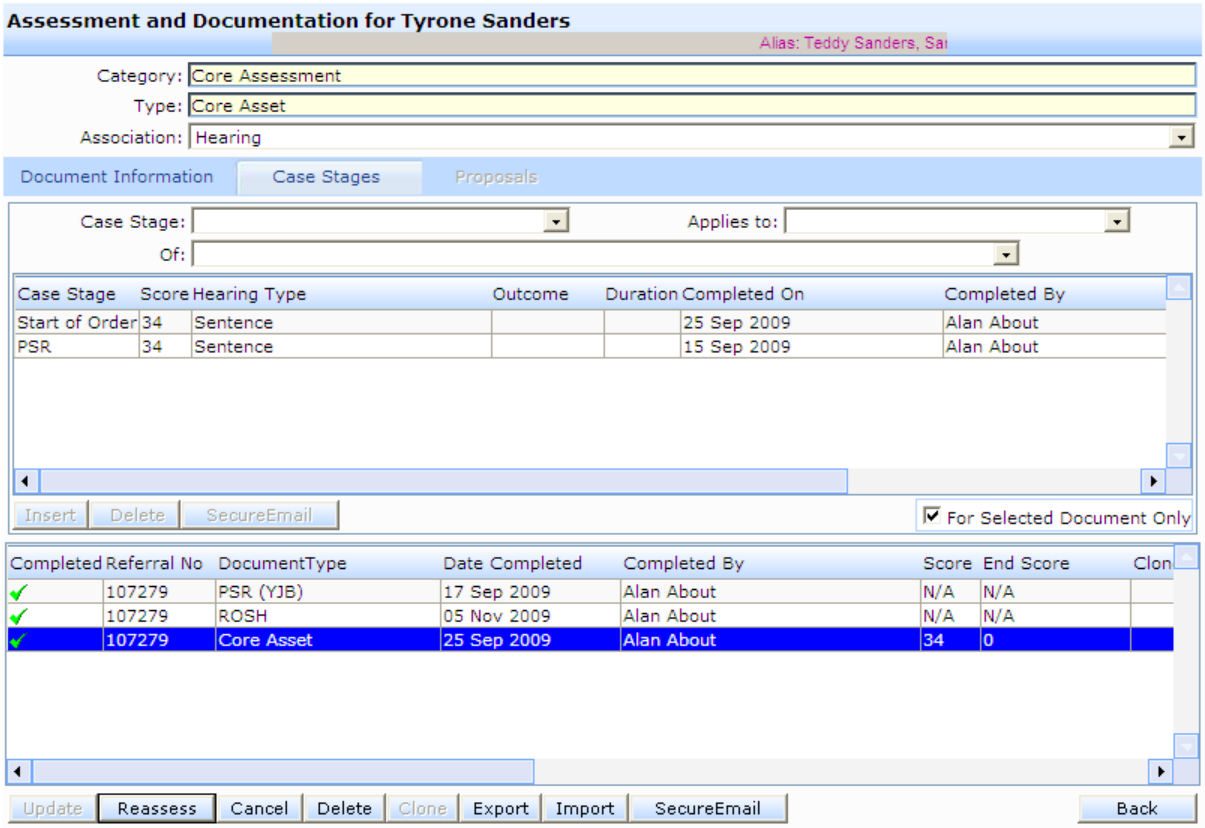
To print all contacts as a single report:

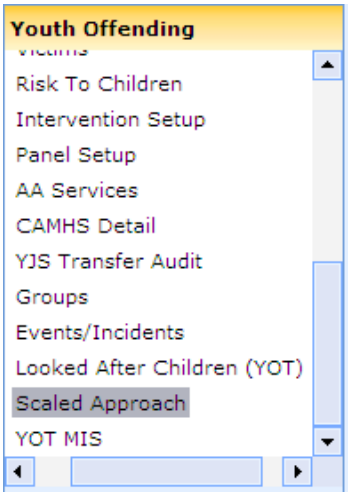
1. Click the **Select All** check box at the bottom of the *Contacts* screen.
2. Click **Print**.
3. A dialog window offers formatting options for the report.
4. Click **OK**.
5. A report is displayed with selected contacts in chronological order.

A user can select or deselect contacts to create a chronological report.

Assessing Intervention Levels

The **Core Asset** is completed for the young person and **Case Staged** appropriately as normal. If 'Yes' has been answered to any of the questions in the risk section, then a **Risk of Serious Harm** Asset (ROSH) is also completed for the young person.





To assess the Scaled Approach level of intervention required for the young person, the worker must access the **Scaled Approach** module towards the bottom of the Youth Offending menu.

Upon entry to the screen, a list of the young person's Core Assets and ROSHs (if there are any) is displayed, as below:

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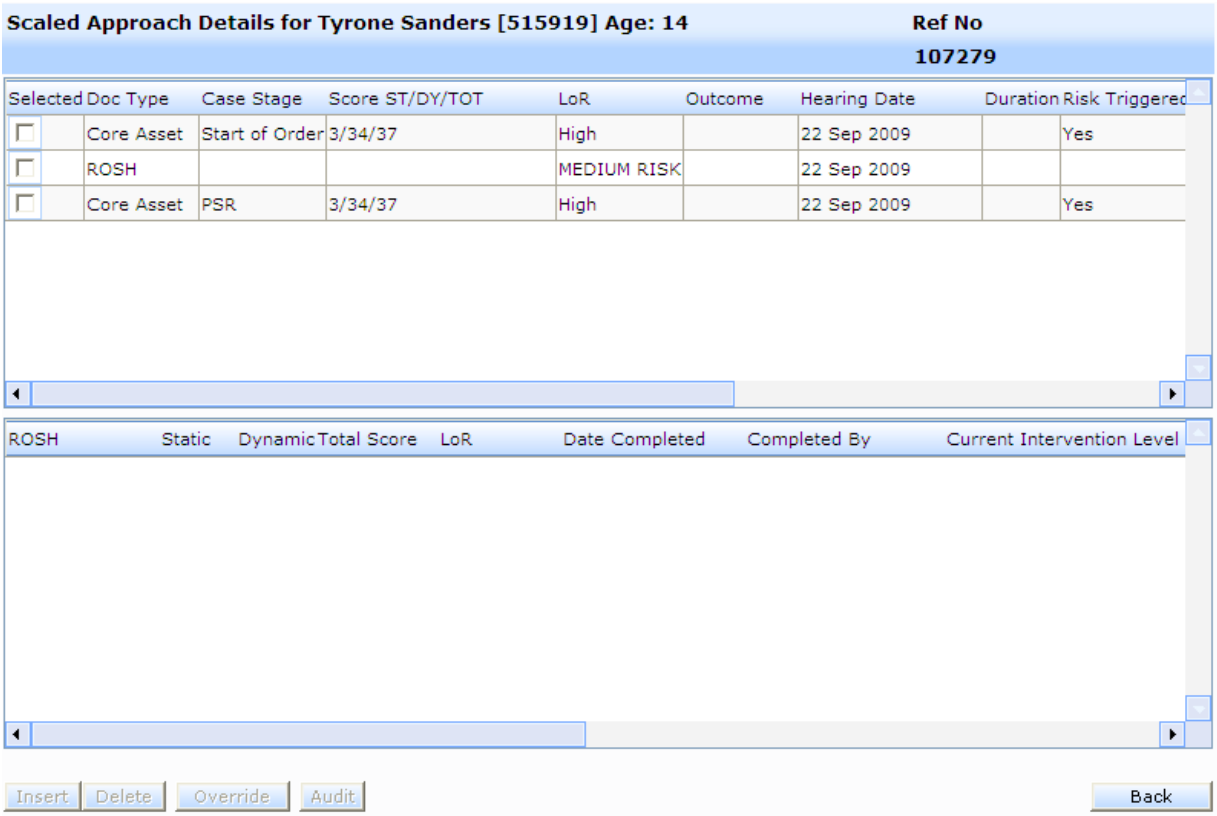

Scaled Approach Details for Tyrone Sanders [515919] Age: 14
Ref No
107279
Selected Doc Type Case Stage Score ST/DY/TOT LoR Outcome Hearing Date Duration Risk Triggered
Core Asset Start of Order 3/34/37 High 22 Sep 2009 Yes
ROSH MEDIUM RISK 22 Sep 2009
Core Asset PSR 3/34/37 High 22 Sep 2009 Yes
ROSH Static Dynamic Total Score LoR Date Completed Completed By Current Intervention Level
Insert
Delete
Override
Audit
Back

The **Document Type** and **Case Stages** for Core Assets are displayed in the grid listing.

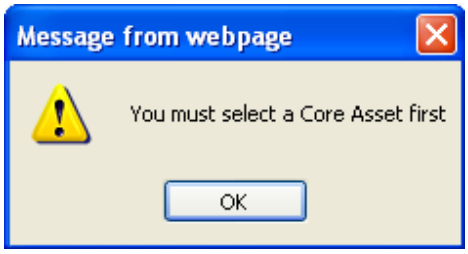
The **Score** column displays the corresponding scores for the Core Asset **Static Factors**, **Dynamic Factors**, and the **Total** of the two scores. (See section 1.6 for further detail on calculations relating to Static and Dynamic Factors).

The **LoR** column displays the **Likelihood of Reoffending** according to the Core Asset Total score (Static plus Dynamic scores) and for ROSHs, displays the **Likelihood of Reoffending** according to the level of risk indicated within the ROSH itself.

Any of the documents listed in the top half of the screen can be viewed in full from this screen by double clicking on the record in the listing.

The buttons along the bottom of the screen remain disabled until at least one document has been selected.

The worker must first tick the relevant Core Asset Case Stage, and then the relevant ROSH if there is one, as below. If a ROSH is selected first, a message displays as shown opposite:



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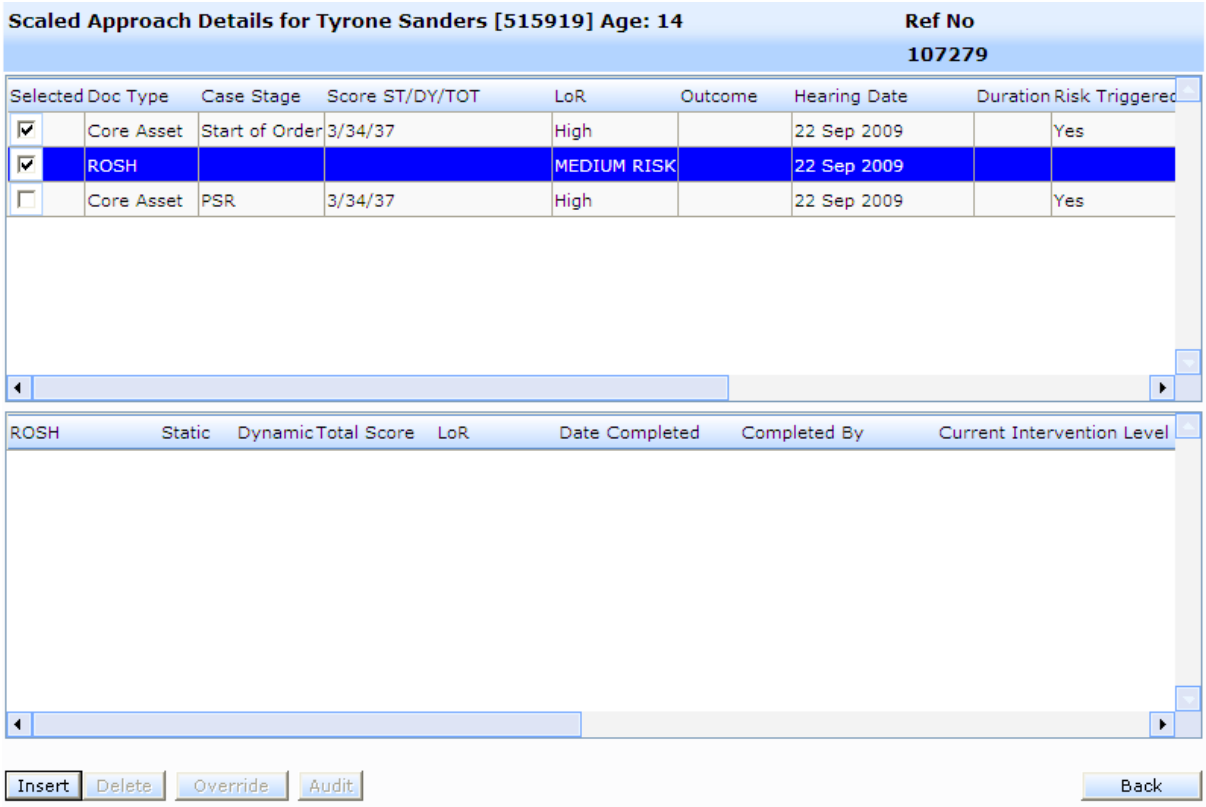
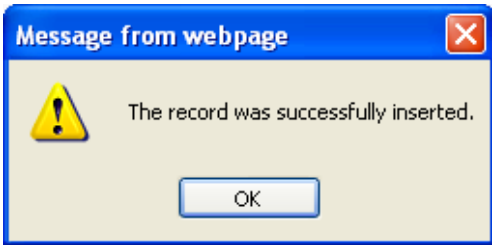

Scaled Approach Details for Tyrone Sanders [515919] Age: 14
Ref No
107279
Selected Doc Type Case Stage Score ST/DY/TOT LoR Outcome Hearing Date Duration Risk Triggered
Core Asset Start of Order 3/34/37 High 22 Sep 2009 Yes
ROSH MEDIUM RISK 22 Sep 2009
Core Asset PSR 3/34/37 High 22 Sep 2009 Yes
ROSH Static Dynamic Total Score LoR Date Completed Completed By Current Intervention Level
Insert
Delete
Override
Audit
Back

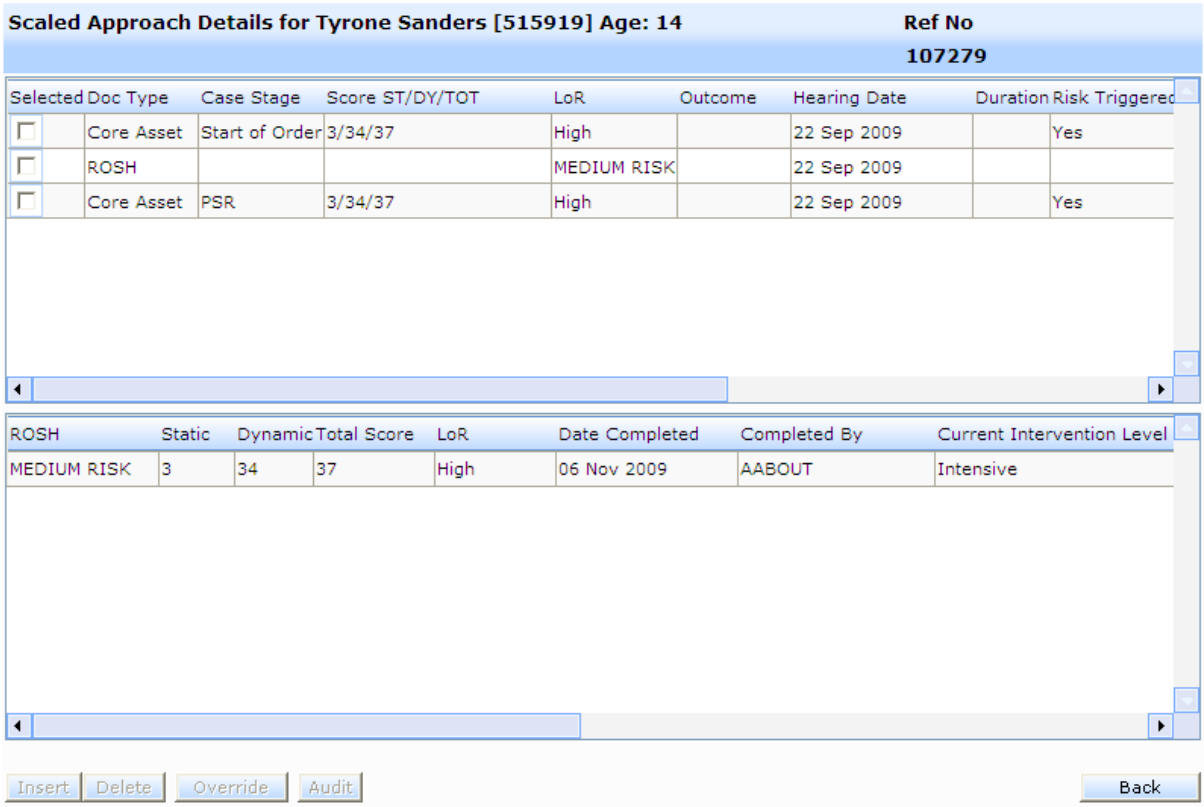
On clicking the Insert button, an **Intervention Level** is calculated and recorded in the grid listing, and a confirmation message displays as shown:



The ROSH and/or Core Asset details that produced the Intervention Level are summarised in the lower grid listing, displaying the ROSH risk level, Core Asset Static, Dynamic and Total scores and related LoR.

The **Date Completed** indicates when the Intervention Level was calculated and recorded, and the **Completed By** column indicates the user who recorded it within the Scaled Approach screen.

The **Current Intervention Level** column displays the level calculated. (See section 1.6 for further details on intervention level calculations). In the above example, the Intervention Level calculated is **Intensive**.


Scaled Approach Details for Tyrone Sanders [515919] Age: 14
Ref No
107279
Selected Doc Type Case Stage Score ST/DY/TOT LoR Outcome Hearing Date Duration Risk Triggered
Core Asset Start of Order 3/34/37 High 22 Sep 2009 Yes
ROSH MEDIUM RISK 22 Sep 2009
Core Asset PSR 3/34/37 High 22 Sep 2009 Yes
ROSH Static Dynamic Total Score LoR Date Completed Completed By Current Intervention Level
MEDIUM RISK 3 34 37 High 06 Nov 2009 AABOUT Intensive
Insert
Delete
Override
Audit
Back

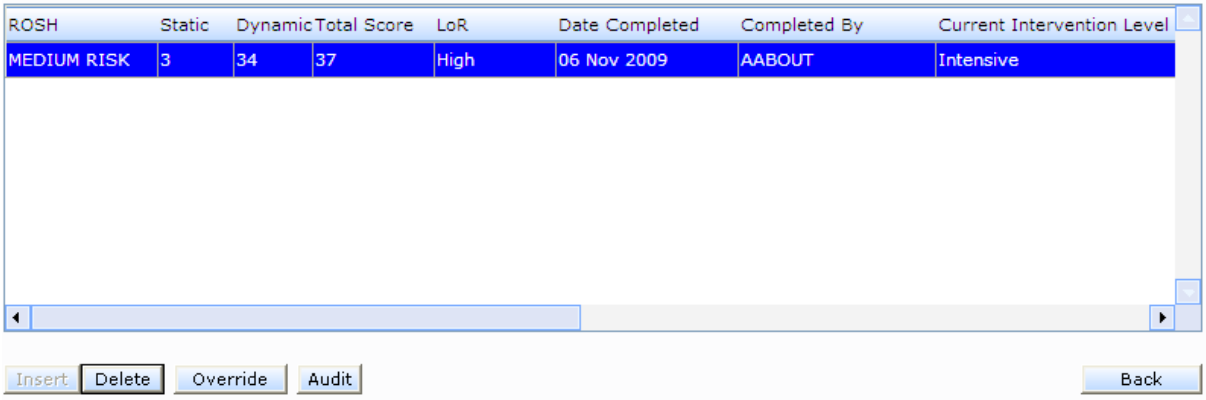
Over-riding Intervention Levels

It is possible to manually over-ride the intervention level that has been automatically calculated according to YJB specifications.

Note: By default, the Override button at the bottom of the Scaled Approach screen is disabled in the **Scaled Approach Default** Module Profile. An additional Module Profile named **Scaled Approach Override** is also shipped. Any users with membership to this Module Profile have access to an enabled Override button.

A local decision would need to be taken as to which users should be allowed access to this function. (Please see **Profile Based Security** User Manual for details on how to end a user's membership to one **Module Profile** and add their membership

If the automatically calculated Intervention Level is not suitable, the relevant record is highlighted in the grid listing by single clicking (as below):



The Override button can then be clicked, and an over-ride screen is presented:

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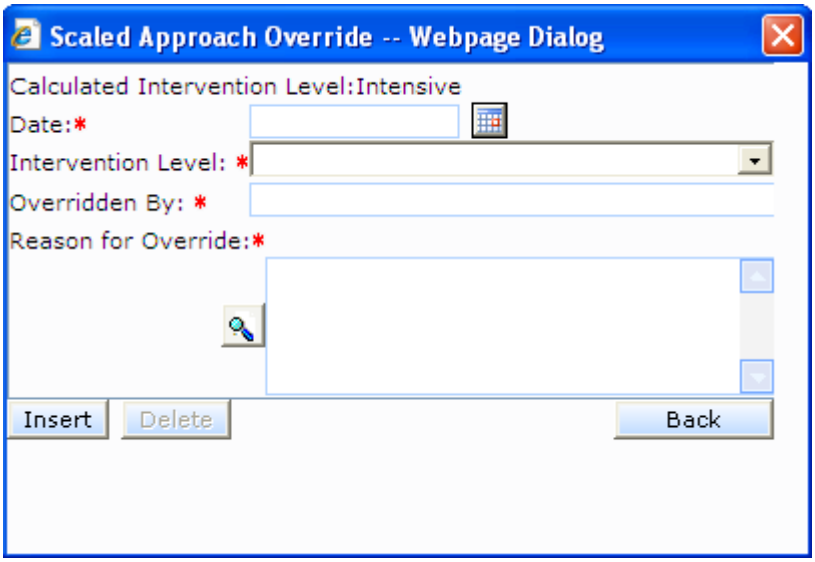
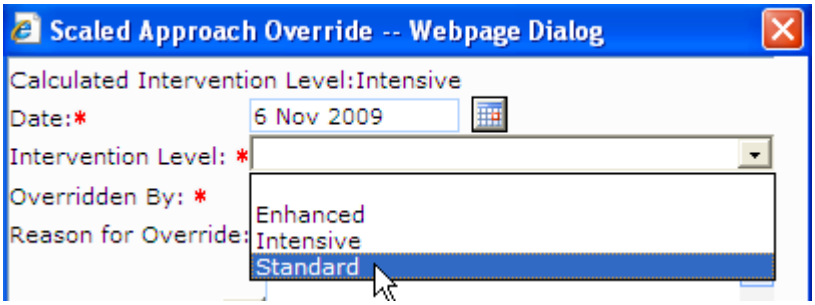


The user must record the **Date** the over-ride is taking place, the new **Intervention Level**, **name** of the user over-riding (the user name is recorded in the audit trail) and free text **reason** for it.

Note: The original YJB specification enabled a manual over-ride by one level only (i.e. from Intensive to Enhanced only, but not Standard). This decision was later revisited and altered, so that any level of intervention can be chosen when manually over-riding (as in the example below):



Clicking the Insert button saves the over-ride action and updates the grid listing as shown below:

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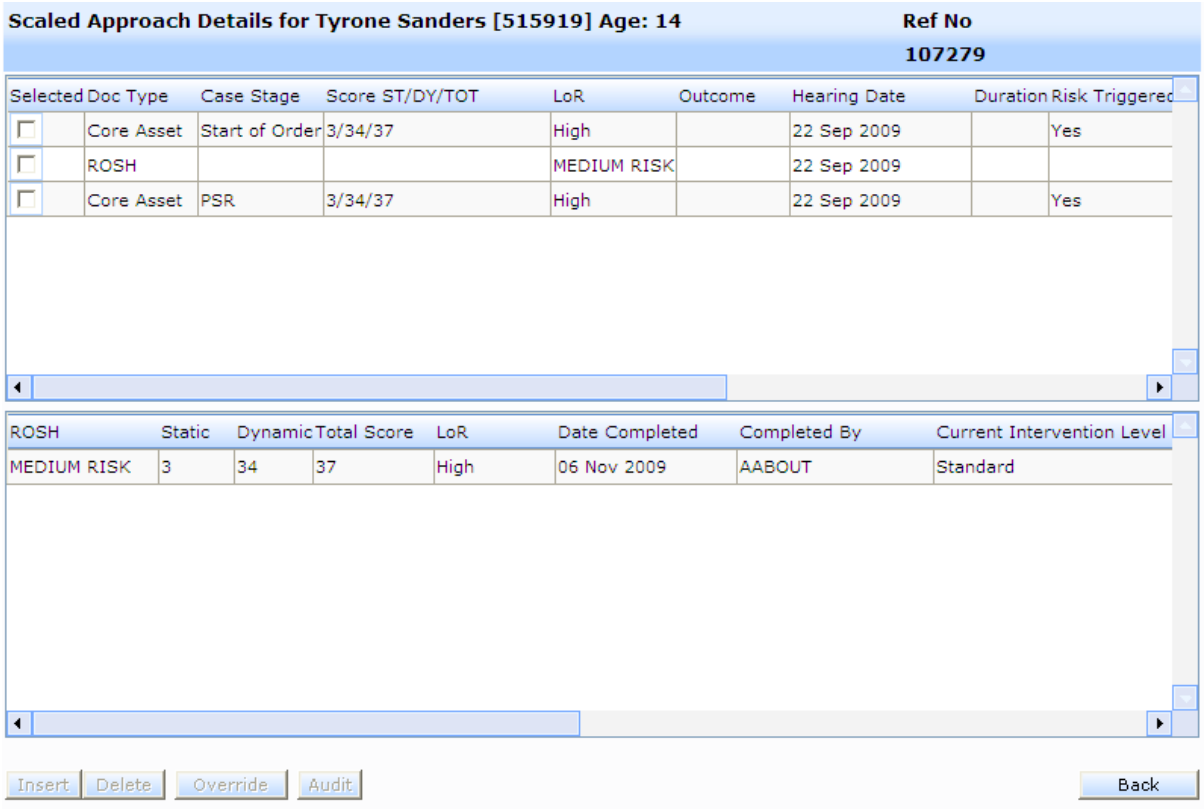
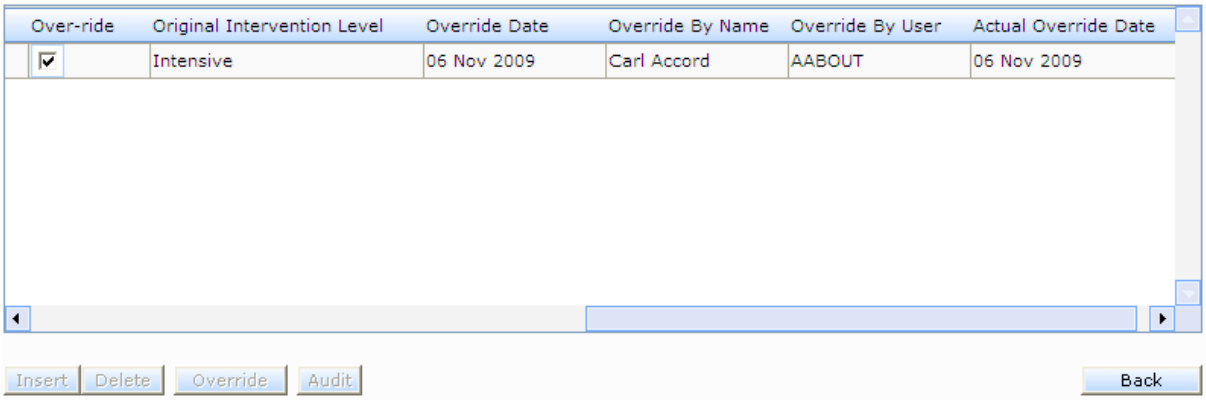

Scaled Approach Details for Tyrone Sanders [515919] Age: 14
Ref No
107279
Selected Doc Type Case Stage Score ST/DY/TOT LoR Outcome Hearing Date Duration Risk Triggered
Core Asset Start of Order 3/34/37 High 22 Sep 2009 Yes
ROSH MEDIUM RISK 22 Sep 2009
Core Asset PSR 3/34/37 High 22 Sep 2009 Yes
ROSH Static Dynamic Total Score LoR Date Completed Completed By Current Intervention Level
MEDIUM RISK 3 34 37 High 06 Nov 2009 AABOUT Standard
Insert
Delete
Override
Audit
Back

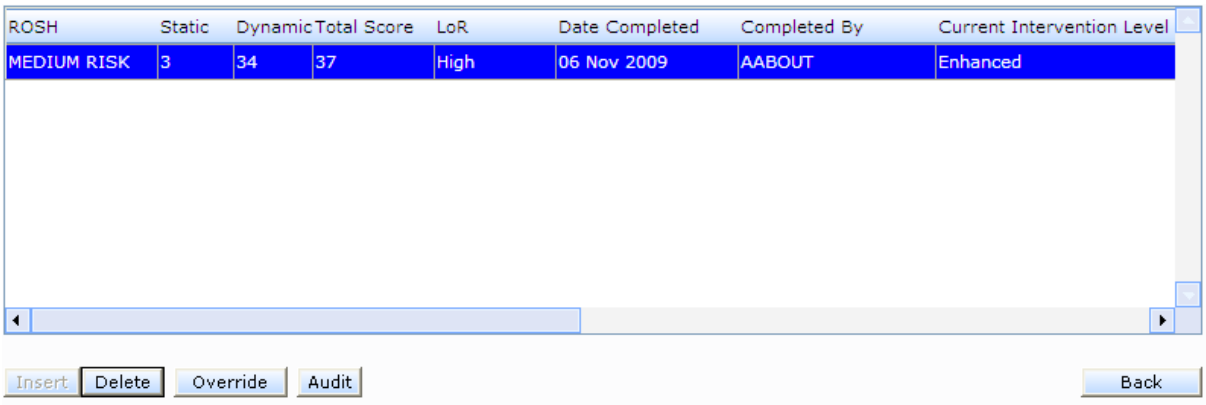
The **Current Intervention Level** updates to the new level selected during the manual over-ride.

Upon scrolling to the right hand side of the grid listing, audit information is displayed relating to the over-ride:


Over-ride Original Intervention Level Override Date Override By Name Override By User Actual Override Date
Intensive 06 Nov 2009 Carl Accord AABOUT 06 Nov 2009
Insert
Delete
Override
Audit
Back

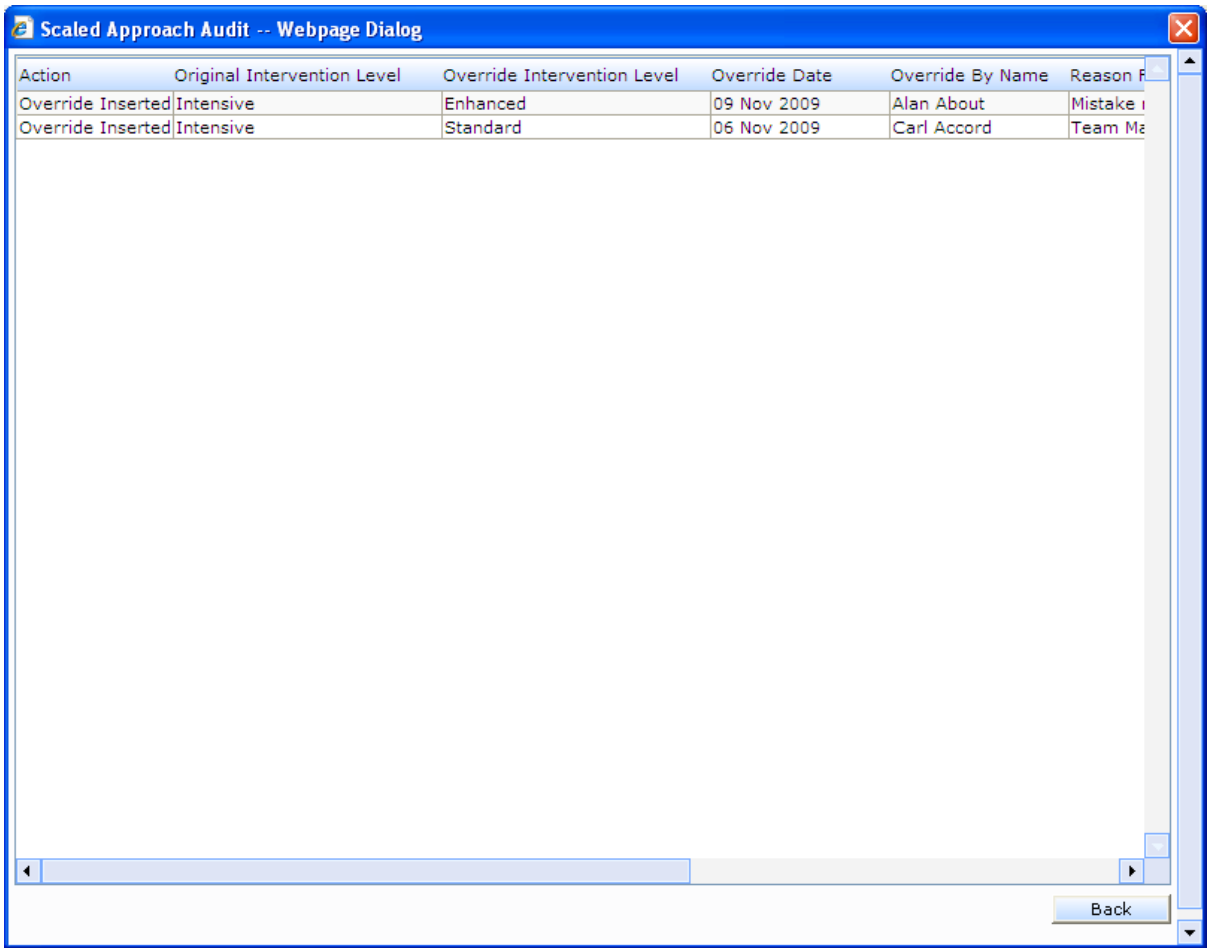
The **originally calculated level** is recorded, the **name** and **date** entered at over-ride, and also the **actual date** the over-ride was performed in the system, and the **username** of the person logged on to perform it.

Multiple manual over-rides can be performed. The audit information displayed in the grid listing will always summarise the originally calculated level and the most recent manual over-ride.

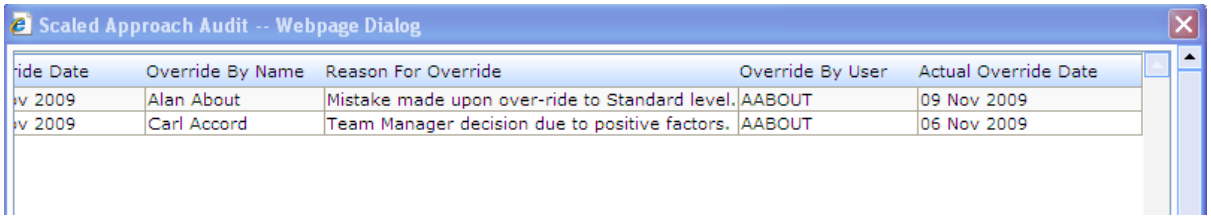


By single clicking to highlight the Intervention Level record in the grid listing and clicking the

button at the bottom of the screen, a full audit is presented which displays the details of all manual over-rides performed to that Intervention Level record:



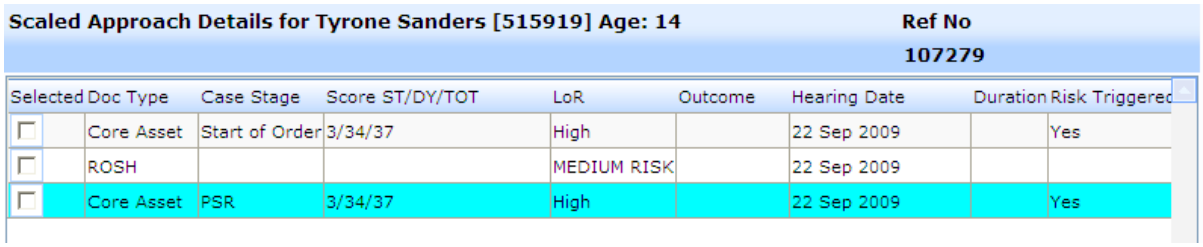
Again, upon scrolling to the right hand side of the listing, further details can be viewed relating to the **dates** and **names** entered at over-ride, and the **actual dates** the over-rides were performed within the system along with the **usernames** of the workers logged in to perform the over-rides:



Clicking the Back button closes the audit screen, and returns to the Scaled Approach module screen behind.

Calculations for Intervention Levels

As specified by the YJB, the CareWorks system automatically generates Intervention Levels by calculating Static Factor Scores, Dynamic Factor Scores, and adding them together for a Total score, in relation to Core Assets. These are displayed within the Scaled Approach module grid listing:



The total score for the selected Core Asset determines the Likelihood of Reoffending (LoR) automatically generated in the next column.

For ROSHs, the CareWorks system recognises the level of Risk recorded within the document itself, and this is automatically displayed in the LoR column, as shown above.

If a Core Asset and a ROSH are selected to calculate an Intervention Level, the highest LoR of the two will determine the level of intervention. If a Core Asset alone is selected to calculate a Level of Intervention, the LoR of that Asset alone will determine the Level of Intervention. This is explained in more detail in the sections below.

Static Factors Scores

Note: The automatically generated Intervention Levels can be manually over-ridden as and when required, by workers with authorised access to the over-ride function.

Static Factors	Scoring	Initial Score

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Offence Type	- Motoring Offences / Vehicle Theft / Unauthorised Taking = 4 - Burglary (domestic & non-domestic) = 3 - Other Offence = 0	
Age at First Reprimand / Caution / Warning	- 10 to 12 = 4 - 13 to 17 = 2 - No previous Reprimand / Caution / Warning = 0	
Age at First Conviction	- 10 to 13 = 4 - 14 to 17 = 3 - No previous convictions = 0	
Number of previous convictions	- 4 or more = 4 - 1 to 3 = 3 - No previous convictions = 0	
Total Static Factors Score (0-16)		**0**

Dynamic Factors Scores

Dynamic Factors / Asset Section	Scoring	Initial Score
Living Arrangements	0, 1, 2, 3, 4	
Family & Personal Relationships	0, 1, 2, 3, 4	
Education, Training & Employment	0, 1, 2, 3, 4	
Neighbourhood	0, 1, 2, 3, 4	
Lifestyle	0, 1, 2, 3, 4	
Substance Use	0, 1, 2, 3, 4	
Physical Health	0, 1, 2, 3, 4	

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Emotional & Mental Health	0, 1, 2, 3, 4	
Perception of Self & Others	0, 1, 2, 3, 4	
Thinking & Behaviour	0, 1, 2, 3, 4	
Attitudes to Offending	0, 1, 2, 3, 4	
Motivation to Change	0, 1, 2, 3, 4	
Total Dynamic Factors Score (0-48)		**0**

Total Factors Scores for LoR (Likelihood of Reoffending)

Static Score (0-16) + Dynamic Score (0-48) = Total (0-64), indicating LoR

Rating (LoR)	
Low (score 0-14 inclusive)	
Medium (score 15-32	
High (score 33-64 inclusive)	

Resulting Intervention Level

Child / Young Person Profile	Intervention Level
Low likelihood of reoffending (as indicated by Asset score [static and dynamic factors] between 0 and 14 inclusive) AND Low risk of serious harm (as indicated by no risk of serious harm assessment being required, or low risk of serious harm assessment)	STANDARD
Medium likelihood of reoffending (as indicated by Asset score [static and dynamic factors] between 15 and 32 inclusive) OR	ENHANCED

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Medium risk of serious harm (as indicated by risk of serious harm assessment)	
High likelihood of reoffending (as indicated by Asset score [static and dynamic factors] between 33 and 64 inclusive) OR High or Very High risk of serious harm (as indicated by risk of serious harm assessment)	INTENSIVE

Summary

You should now be familiar with

- Recording a PSR Proposal of a YRO with related requirements
- Recording a court Outcome of a YRO with related requirements
- Maintaining a YRO Programme with related Interventions
- Recording Contacts for a YRO, related to specific requirements
- Using the Scaled Approach module to assess interventions levels automatically
- Using the Scaled Approach module to manually over-ride automatically generated intervention levels
- The calculations performed to automatically identify Intervention Levels

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